NEW ZEALAND RESEARCH INFORMATION SYSTEM

DATA SPECIFICATION AND DICTIONARY

Version 1.3   (May 2026)

Contents

Notes on the Specifications

NZRIS is built on the underlying infrastructure of the Digital Science Symplectic Elements system, which means its structure and concepts are influenced by that platform's design and requirements. In particular, data must be provided in files split across defined categories, reflecting the way Elements organises information. To improve usability, hyperlinks have been added throughout this document for easier navigation. Additionally, all associated code sets and label schemes referenced in this dictionary will be published and maintained on the NZRIS GitHub site, ensuring they remain accessible and up to date.

Introduction

This data dictionary and specification document provides a comprehensive reference for data providers contributing to the New Zealand Research Information System (NZRIS). Its primary purpose is to support providers in understanding the structure and requirements of the NZRIS data model, and to guide the accurate preparation and submission of data for ingestion. The document outlines the scope of NZRIS, including the types of records it captures – such as grants, individuals, organisations, funds, and research outputs – and the relationships between them. It details the required structure and format of each data file, the standard code sets and label schemes to be used, and the rules for creating valid ingest documents. In addition to these specifications, the document includes a complete data dictionary that defines each field, its purpose, data type, constraints, and any applicable validation rules. Together, these resources are intended to ensure consistency, interoperability, and high-quality data across all NZRIS submissions.

Data-Contributing Organisation Role Definitions

NZRIS brings together data from a range of contributing organisations, each with distinct roles in New Zealand's research landscape. Organisations that provide data can take on any of three roles. These roles are **not fixed**: they can change from one funded research project to another, and the data supplied reflects the role the organisation performed in each case – for example, a funder will provide more information than a recipient (non-subcontracting) organisation.

Data providers will need to review the research projects they are involved in – whether as a funder, recipient (subcontracting), or recipient (non-subcontracting) organisation – to determine the role they fulfilled for that project. Once the role is identified, the organisation can then supply the data relevant to that role. This flexibility ensures that NZRIS can accommodate diverse organisational needs while maintaining a consistent approach to data sharing and integration.

Funder

Funders are entities that provide money to support research and innovation in New Zealand. This includes government agencies, specialist funders, and universities that distribute their own research funding or lead national initiatives like the Centres of Research Excellence (CoREs) and National Science Challenges. These organisations decide what research to support, run funding rounds, and make sure investments deliver benefits for Aotearoa.

Recipient (Subcontracting) Organisation

Recipient (subcontracting) organisations are entities which receive funding to conduct research. These organisations act as both recipients and intermediaries, as they can subcontract components of funded work to other organisations.

Recipient (Non-Subcontracting) Organisation

Recipient (non-subcontracting) organisations are entities which receive research funding and complete all research activities internally without outsourcing any part of the work.

As noted above, an organisation can play multiple roles in the research funding process, and within a single dataset the data supplied to NZRIS will depend on the role the organisation holds for each grant or contract. For example, a university might act as a funder, in which case it needs to provide information about the funding round and how grants were allocated. The same university could also receive funding from a government agency for a specific project and subcontract part of the work to another organisation –

meaning it must report subcontract details and project outputs. Finally, that university might be a subcontracted recipient for a completely different project, where its only responsibility is to provide data on the outputs from the work it completed.

Types of Records Required by Data-Contributing Organisation Role

Role											
Funder	Appropriation *Government agency funder only*	Primary Fund	Secondary Fund	Tertiary Fund	Funding Round	Grant	User		Contract	Payment	Organisation
Recipient (Subcontracting) Organisation							User	Publication	Sub Contract	Payment	Organisation
Recipient (Non-Subcontracting) Organisation							User	Publication			

Funder

Provide data on:
Fund
Funding Round
Grant
Contract
Payments
Recipient/Collaborating Organisation
Associated People

Recipient (Subcontracting)

Provide data on:
Subcontract
Payments
Recipient Organisation
People (Authors)
Outputs (Publications)

Recipient (Non Subcontracting)

Provide data on:
People (Authors)
Outputs (Publications)

A single organisation can hold different roles across projects
with different data provision requirements for each

Structure Overview
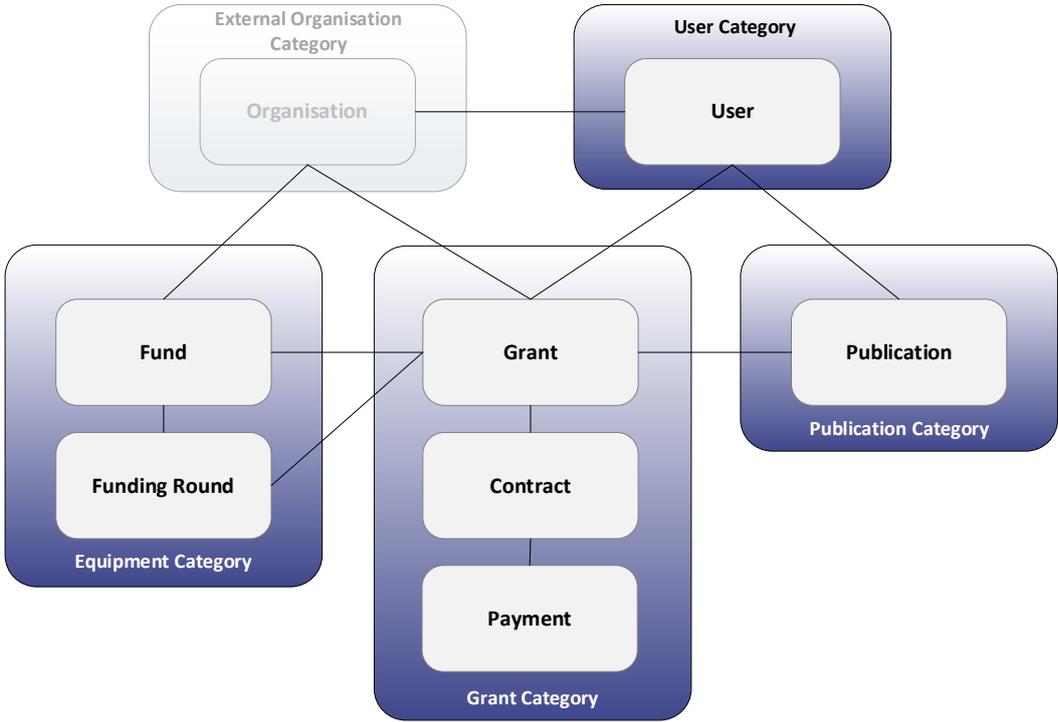
The NZRIS data model is organised into five core categories. These categories are: **Grant**, which captures information about grants, contracts, and payments; **Equipment**, which includes data on research funds and funding rounds; **Publication**, which records research outputs and their links to individuals and funding sources; **User**, which provides information about people involved in research activities (i.e. grant recipients or collaborators); and **External Organisation**, which describe the entities participating in or supporting research, including funders, research providers, and other contributors.

The NZRIS system is underpinned by a Sympletic Elements database which has been configured to meet the requirements of the New Zealand science and innovation sector. This adaption has resulted in the non-standard use of the **Equipment** Category. While the Equipment Category would usually record details about physical research tools, like specialist machines or instruments, NZRIS has adapted this module to hold information about research funds and funding rounds. This means that instead of describing equipment, it describes funding allocations that support science research. This approach was chosen because the module already provides the structure needed to link funding information to grants, organisations, and research outputs. Using an existing module keeps the system consistent and avoids creating extra complexity, while still allowing the flexibility to track funding in a clear and connected way.

Each of the five NZRIS data categories – Grant, Equipment, Publication, User, and External Organisation – are introduced with a summary table that provides an overview of the available record types within that category. These summary tables help data providers understand the structure and scope of the data expected for each category, including the specific types of records that can be submitted. Where applicable, definitions are provided for each record type to ensure clarity and consistency in how data is interpreted and reported. In addition to outlining the record types, each category section includes guidance on how to establish relationships between records – both within the category and across categories – using linking files.

Glossary of Terms

Key Concepts (Data Model and Funding Concepts)

Administering Organisation

> Organisation administering a fund but without unilateral authority over funding decisions (e.g. National Science Challenge (NSC) Lead Organisation).

Appropriation

> Government budget allocation for research funding. (See Fund / Funding Round / Appropriation Type Records section.)

Category

> A high-level grouping of records in NZRIS (e.g. Grant, Equipment, Publication, HR, Organisation).

Code Sets

> Standardised lists for controlled values such as currency codes and language codes. (See Code Sets section.)

Collaborating Organisation

> An organisation contributing to a project without being the primary recipient of funds. (See Collaborating Organisation detailed field information.)

Constraints

> Conditions or limitations applied to a grant, contract, or payment. (See Constraints detailed field information.)

Contract

> Formal agreement governing terms of funding.

Directly Associated Individual

> A person with a formal, documented role in a grant project, such as being named in the application, receiving funding, or contributing to its execution, management, or reporting. (See User / Person Records section.)

Equipment

> A category in the underlying database used by NZRIS to record information about research funds, funding allocations, and funding rounds, rather than physical research tools.

Fund

> A dedicated financial resource provided by a funder to support research activities, typically distributed through grants or awards for specific projects, programmes, or objectives. (See Fund / Funding Round / Appropriation Type Records section.)

Funder

> An Organisation or entity that provides financial resources to support research activities, typically through grants, awards, or funding programmes, and sets the priorities or criteria for how those funds are allocated. (See External Organisation Records section.)

Funding Round

> A scheduled period during which a funder invites and assesses applications for research funding, typically under defined criteria and priorities, leading to the allocation of grants or awards. (See Fund / Funding Round / Appropriation Type Records section.)

Grant

A sum of money awarded by a funder to support a specific research project or activity, usually following an application process and subject to agreed terms, conditions, and reporting requirements. (See Grant / Contract / Payment Type Records section.)

ID

A unique identifier for each record to distinguish it from all others, ensuring accurate referencing and data integrity across systems (i.e. grant or contract number).

Indirectly Associated Individual

A person linked to a grant without a formal or funded role, typically through outputs, affiliation, or informal collaboration (e.g. co-authors, technical support, observers, or institutional contacts). (See User / Person Records section)

Labels

A field used to categorise records by assigning predefined values, such as ANZSRC codes or designated grant themes, enabling consistent grouping, filtering, and classification within the dataset. (See Label Schemes section.)

Link Type / Numeric Link Value

Numeric codes used to define relationships between records. (See Link Values section.)

Metadata

Metadata is the main information that describes a record. It applies to all record types and includes key details that define and explain the record. For example, a grant metadata record contains information such as the grant number, title, description, amount, and value; similarly, metadata can describe fund details or publication information.

Payment

Total amount paid under a grant or contract during a calendar year, calculated from all associated financial transactions.

Protected

The "protected" field indicates that a record should not be publicly displayed on the NZRIS website. It is applied to individual records across all record types (e.g. grants, funds, users, and publications) to ensure sensitive or restricted information remains hidden from public view.

Publication

Research output resulting from funded activities (e.g. journal article, dataset, book). (See Publication Type Records section.)

Recipient Organisation

The organisation that receives the funding or support associated with a record. For example, in a grant record, the recipient organisation is the entity awarded the grant and responsible for managing the funded activity. (See External Organisation Records section.)

Record Type

Specific type within a category (e.g. Grant, Payment, Funding Round, Chapter).

Role Types

Roles associated with individuals in research projects (e.g. Principal Investigator, Co-investigator). (See

Role Type Definition section.)

Specific Identifiers

ANZSRC (Australian and New Zealand Standard Research Classification)

A Standardised framework used in Australia and New Zealand to classify research activities by type, field of research, and socio-economic objective, ensuring consistency in reporting and analysis. (See Label Schemes section for details.)

DOI (Digital Object Identifier)

A unique, persistent identifier assigned to digital objects such as journal articles, datasets, and reports, providing a permanent link to their location on the internet for reliable citation and access. (See DOI detailed field information.)

GRID ID (Global Research Identifier Database Identifier)

A global identifier for research organisations which was superseded by the ROR (Research Organisation Registry) ID in 2021 but is still used internally for Digital Science products (e.g. Dimensions). Used for disambiguation. (See **Error! Reference source not found.** detailed field information.)

ISBN / ISSN / eISSN

Standard identifiers for published works: ISBN uniquely identifies books and monographs, ISSN identifies print serials such as journals, and eISSN is the electronic equivalent for online serial publications. (See ISSN, ISBN-10, ISBN-13, eISSN detailed field information.)

NZBN (New Zealand Business Number)

A unique, government-issued identifier for businesses and organisations in New Zealand, used to streamline interactions and ensure accurate identification across public and private systems.

ORCiD

A unique, persistent digital identifier for researchers that links them to their publications, affiliations, and other scholarly outputs, ensuring accurate attribution across systems.

ROR ID (Research Organisation Registry)

A globally unique, persistent identifier for research organisations, maintained by the open, community-driven Research Organisation Registry (ROR). It enables accurate affiliation linking across scholarly systems and replaces the retired GRID IDs. (See **Error! Reference source not found.** detailed field information.)

Fields by Type

Grant / Contract / Payment Type Records
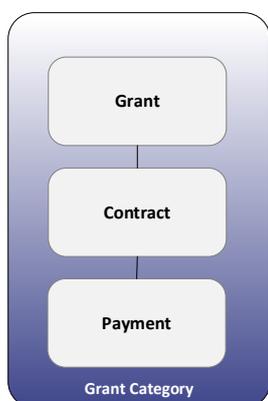
Within NZRIS, research funding is represented through three key record types: **grants**, **contracts**, and **payments**. A **grant record** captures the allocation of funding awarded to support specific research activities, typically through a competitive or negotiated process. A **contract record** represents a formal agreement that governs the terms and conditions of funding. While contracts are often associated with grants – defining the obligations and deliverables tied to awarded funding – they may also exist independently. For example, contracts can be used to fund infrastructure which support research rather than specifically fund it, or to formalise subcontracting arrangements between organisations, even when these are not directly linked to a specific grant. In addition, some contracts operate under a **devolved** model, where responsibility for administering and distributing funding is delegated to another organisation (for example, the Marsden fund is devolved to Royal Society Te Apārangi). **Payment records** correspond to a calendar year and represent the total amount paid under a contract for that year, derived from associated financial transactions including disbursements to recipient and subcontracted organisations. A devolved record type is intended to capture specific contracts where funding decisions are devolved to another organisation

The table below provides an overview of the available fields for each record type. More specific and detailed information is available in the Ingestion Template and Detailed Field Information sections below.

"[M]" indicates that the field is mandatory for that data type.

Grant / Contract / Payment Record Overview

Grant Type	Contract Type	Payment Type	Devolved Type **
Alternative Description (Grant)			
Alternative Title (Grant)			
Application Reference			
	Associated Grant Reference	Associated Grant Reference	
Award Date (Grant) [M]		Payment Date [M]	
Collaborating Organisation	Collaborating Organisation		
Constraints	Constraints		Constraints

Grant Type	Contract Type	Payment Type	Devolved Type **
Contract Reference	Contract Reference [M]	Contract Reference [M]	Contract Reference [M]
Description (Grant) [M]	Summary	Details [M]	Summary [M]
Description Language			
End Date (Grant)	End Date (Grant) [M]	End Date (Grant)	End Date (Grant) [M]
Funder Name [M]	Distributing Organisation [M]	Distributing Organisation [M]	Distributing Organisation [M]
Grant Reference [M]			
Intended Outcome	Intended Outcome		
Labels (Grant)	Labels (Grant)		Labels (Grant)
	Parent Contract Reference	Parent Contract Reference	Parent Contract Reference
		Payment Reference [M]	
Protected (Grant) [M]	Protected (Grant) [M]	Protected (Grant) [M]	Protected (Grant) [M]
Recipient Organisation	Recipient Organisation [M]	Recipient Organisation [M]	Recipient Organisation [M]
Start Date (Grant)	Start Date (Grant) [M]	Start Date (Grant)	Start Date (Grant) [M]
Title (Grant) [M]	Name (Grant) [M]		Name (Grant) [M]
Title Language			
Value [M]	Value [M]	Value [M]	Value [M]

** Only used for contracts where funding is devolved to another organisation

Grant Type Links

In NZRIS, relationships between records – both within and across data categories – are established using a predefined set of relationship types. These relationships are essential for accurately representing the connections between entities such as grants and publications, and between types such as grants and contracts. The full list of available relationship types is detailed in the *Links* section of this document, which outlines the valid combinations and numeric values for linking records. In the case of **Grant** category records, the following table outlines the specific relationship links that can be used to associate grants with related record types.
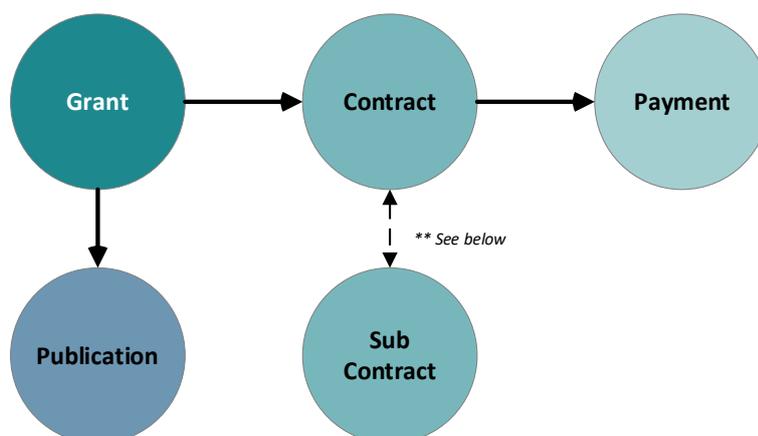
Link Type Usage	Category id-1	Category id-2	Numeric Link Value
Grant to Contract	Grant	Grant *(Contract)*	236
Contract to Payment	Grant *(Contract)*	Grant *(Payment)*	12
Contract to Contract	Grant *(Contract)*	Grant *(Contract)*	237
Publication resulting from Grant	Publication	Grant	2

*The order of the categories is critical to ensure the relationship is correctly interpreted during ingestion. Refer to the **Link Values** section below.*

** The Contract to Contract link (value 237) indicates the relationship between an original contract and a subcontracted agreement when work is outsourced to another organisation. The original contract record containing full metadata is provided by the funding body (e.g. the Royal Society for a Marsden grant) with metadata for the subcontract provided by the subcontracting research organisation (including a **Contract-to-Contract link** referencing the original grant number). There is no requirement to duplicate the original metadata nor to provide metadata related to received contracts.

Fund / Funding Round / Appropriation Type Records
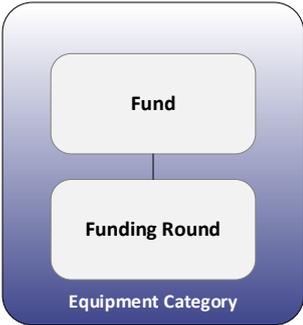
The Equipment category in NZRIS captures information related to the funding mechanisms that support research infrastructure and equipment. This includes records for **Funds**, **Funding Rounds**, and **Appropriations**, which together describe how financial resources are allocated and managed to enable research capability. Fund records represent the overarching sources of funding and are classified into standard types such as *Contestable*, *Negotiated*, *On-Demand*, *Scholarships*, *Fellowships*, *Internships*, and *Other*, each with specific characteristics and purposes. This section provides definitions for each of these fund types to support consistent reporting. It also includes a summary table outlining the available fields within the Equipment category, along with their formats, data types, and validation requirements. Additionally, guidance is provided on how to establish relationships between Equipment records and other NZRIS categories using predefined links, ensuring that the flow of funding and its connections to research activities are accurately represented.

While the Equipment category is part of the underlying Symplectic Elements database and is typically used to record details about physical research tools, NZRIS has adapted this module for a different purpose: to store information about research funding allocations and funding rounds. This approach was chosen because the module already provides the structure needed to link funding information to grants, organisations, and research outputs. Using an existing module keeps the system consistent and avoids creating extra complexity, while still allowing the flexibility to track funding in a clear and connected way.

Available Record Types and Definitions

Type	Definition
Contestable Fund	A pool of funding that is open to multiple applicants who compete for limited resources. Funding is awarded based on a competitive assessment of proposals against set criteria, and not all applicants are guaranteed support.
Scholarships Fund	A dedicated fund that provides financial support to individuals (usually students) to assist with education-related expenses. Scholarships are typically awarded based on academic merit, financial need, or specific eligibility criteria.
Internships Fund	A fund established to support internship opportunities, usually by providing stipends, wages, or other financial assistance to interns or to organisations hosting interns. The aim is to facilitate practical work experience for students or early-career professionals.

Type	Definition
Fellowships Fund	A fund that supports individuals (fellows) to undertake advanced study, research, or professional development. Fellowships are often awarded to experienced professionals, researchers, or academics, and may cover living expenses, project costs, or travel.
On-Demand Fund	A flexible funding pool that is available for allocation as needs arise, rather than through scheduled funding rounds. Applicants can request support at any time, and funding decisions are made on a rolling or as-needed basis.
Negotiated Fund	A fund where the terms, amount, and purpose of funding are determined through direct negotiation between the funder and the recipient, rather than through a competitive or open application process. This approach is often used for strategic partnerships or unique projects.
Other Fund	A general fund (or "other fund") is a pool of financial resources established to support specific objectives, programmes, or activities that do not meet the criteria of contestable, negotiated, grant, scholarship, internship, fellowship, or on-demand funds. The structure, eligibility, and allocation mechanisms for these funds are determined by the funder and may be tailored to unique needs, pilot initiatives, or strategic priorities. These funds are typically governed by bespoke arrangements and may not follow standard funding processes.
Funding Round	A funding round is a scheduled period during which a funder invites and assesses applications for financial support. All eligible proposals received within this window are evaluated – often competitively – against set criteria, and funding decisions are made at the conclusion of the round. Funding rounds are typically used for contestable funds, scholarships, grants, and similar mechanisms, and are distinct from on-demand or rolling funding, where applications are accepted and assessed at any time.

The table below provides an overview of the available fields for each record type. More specific and detailed information is available in the Ingestion Template and Detailed Field Information sections below.

"[M]" indicates that the field is mandatory for that data type.

Fund / Funding Round/ Appropriation Record Overview

Contestable Fund Type	Funding Round Type	Scholarship, Internship, Fellowship, On-Demand, Negotiated, Other Fund Types	Appropriation Type **
Administering Organisation		Administering Organisation	
	Allocation Method		
Alternative Name (Fund)		Alternative Name (Fund)	
Disestablishment Date (Fund)		Disestablishment Date (Fund)	End Year
Establishment Date (Fund)		Establishment Date (Fund)	Start Year
Fund Description	Funding Round Description	Fund Description	Appropriation Description
Name (Fund) [M]	Name (Fund) [M]	Name (Fund) [M]	Name (Fund) [M]
Protected (Fund) [M]	Protected (Fund) [M]	Protected (Fund) [M]	
			Vote

** *This record type will generally only be provided by Government agency funders*

Fund Type Links

Fund and Funding Round records play a central role in describing how financial resources are structured and allocated within NZRIS. To accurately reflect the connections between these funding mechanisms and other entities NZRIS uses a defined set of relationship types. These links enable data providers to represent how funds are distributed, how funding rounds are associated with specific fund types, and how funding flows through the research system. The following is a list of the valid relationship types that can be used to connect Fund and Funding Round records to each other and to Grant records (or to Contract records where no grant records exist).
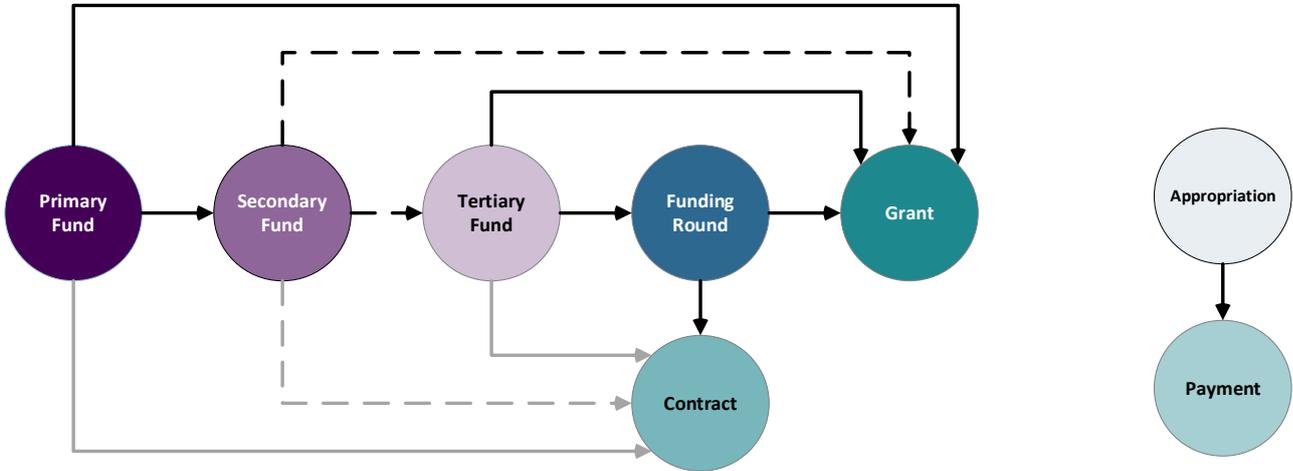
Link Type Usage	Category id-1	Category id-2	Numeric Link Value
Primary Fund to Secondary Fund	Equipment *(Primary Fund)*	Equipment *(Secondary Fund)*	231
Secondary Fund to Tertiary Fund	Equipment *(Secondary Fund)*	Equipment *(Tertiary Fund)*	232
Fund to Funding Round	Equipment *(Funding Round)*	Equipment *(Fund)*	40
Primary Fund to Grant (or Contract)	Grant	Equipment *(Primary Fund)*	233
Secondary Fund to Grant (or Contract)	Grant	Equipment *(Secondary Fund)*	234
Tertiary Fund to Grant (or Contract)	Grant	Equipment *(Tertiary Fund)*	235
Grant (or Contract) to Funding Round	Grant	Equipment *(Funding Round)*	16
Payment to Appropriation	Grant *(Payment)*	Equipment *(Appropriation)*	238

The order of the categories is critical to ensure the relationship is correctly interpreted during ingestion. Refer to the **Link Values** *section below.*

External Organisation Records

The External Organisation category captures information about the various entities involved in the research ecosystem. NZRIS records organisations that are <u>directly associated</u> with research funding activities in a range of roles, including as **funding organisations** (those that allocate financial resources to support research), **recipient organisations** (those that receive funding to undertake research), and **collaborating organisations** (entities that contribute to research activities without necessarily receiving direct funding). This section follows the same structure as other categories, providing definitions for relevant organisation types, a summary table of available fields and their specifications, and guidance on how to establish valid relationships between organisation records and other NZRIS categories using predefined links.

While the Organisation category plays a vital role in linking entities across the NZRIS system, the amount of information required from data providers is intentionally minimal. This is because NZRIS employs an automated disambiguation process to consolidate organisation records and resolve naming inconsistencies across datasets. For example, a single institution may appear under different names – such as "University of Auckland," "The University of Auckland," or "Auckland University" – depending on the source or time period. To ensure accurate reporting and analysis, NZRIS matches these variations to a single, unified organisational record using unique identifiers such as GRID IDs, ROR numbers, or NZBNs. In most cases, this process occurs automatically, reducing the burden on data providers. However, where an organisation is not already present in the NZRIS database, providers can supply a minimal set of required fields to enable the creation of a new organisational record. This approach ensures consistency across the system while maintaining flexibility for new or emerging entities - such as private businesses.

Note: Organisations recorded by the Research Organisation Registry (ROR) - <u>Research Organization Registry (ROR) | Home</u> - are automatically included in the NZRIS database. Because these organisations already exist in NZRIS, data providers <u>do not need</u> to supply additional information for them.

The table below provides an overview of the available fields for each record type. More specific and detailed information is available in the Ingestion Template and Detailed Field Information sections below.

"[M]" indicates that the field is mandatory for that data type.

Organisation Record Overview

External Organisation Type
Acronyms
Additional Aliases
Address [M]
Alternative Name (Organisation)
Disestablishment Date (Organisation)
Establishment Date (Organisation)
Error! Reference source not found.
Error! Reference source not found.

Organisation Name [M]
Parent Organisation
Predecessor Organisation
Related Organisation
Error! Reference source not found. Number
Subsidiary Organisation
Successor Organisation
Organisation Type
Website URL

Unlike other NZRIS data categories, the Organisation category does not use separate link records to establish relationships with other entities. Instead, information about organisations – such as funders, recipients, administering organisations, and collaborators – is embedded directly within the metadata of other categories, particularly within the Grant category. This approach reflects the central role organisations play in the research funding landscape and allows for more streamlined data submission. By including organisation identifiers and relevant role information directly in the grant metadata, NZRIS can accurately associate organisations with their respective roles in funding, managing, or participating in research activities, without requiring additional linking files.

Publication Type Records

The Publication category in NZRIS captures metadata related to research outputs, enabling a comprehensive view of the scholarly and creative contributions resulting from funded research. This includes a wide range of output types such as journal articles, books, chapters, conference papers, datasets, media, and more. This section follows the standard NZRIS structure, beginning with definitions of each recognised publication type to support consistent classification and reporting. A summary table outlines the available fields, including their formats, data types, and validation requirements. Additionally, this section provides guidance on how to establish relationships between publication records and other NZRIS categories – such as grants and individuals – using predefined link records. These relationships are essential for tracing the connections between research funding, contributors, and the outputs they produce, supporting a holistic understanding of research activity across the system.

Publication

Publication Category

Available Record Types and Definitions

Type	Definition
Book	A substantial written work, such as an edited volume or monograph, that presents original research, critical analysis, or creative content. Chapters may be authored by different contributors and harmonised by editors to form a cohesive whole. To be considered a research output, the book must be formally published and contribute notable value to its field or discipline.
Chapter	A distinct and authored section within an edited book, monograph, or encyclopaedia that presents original research, analysis, or creative content. Chapters are typically written independently and contribute to the overall coherence and scholarly value of the larger work. To be considered a research output, the chapter must be formally published and add notable value to its field or discipline.
Conference	A scholarly or creative work presented at a conference and formally disseminated through published proceedings or equivalent channels. This includes papers, presentations, or editorial content that represent original contributions to research or practice. To be considered a research output, the work must be publicly accessible and add demonstrable value to the field.
Journal Article	A written work published in a scientific, scholarly, or professional journal that presents original research, critical review, or editorial insight. Journal articles must be formally published and publicly accessible, contributing notable value to their field or discipline. This includes peer-reviewed research papers, review articles, and editorials that demonstrate intellectual or creative merit.
Artefact	A physical or digital object created as part of research or creative practice. This may include, but is not limited to: sculpture, prototype, choreography, creative writing, compilation, or literary work.

Type	Definition
	Note: Artefacts may be standalone or embedded within a broader creative or research context.
Composition	An original and creative work expressed through music or sound. This refers to the work itself – such as a composition, recording, or performance – and must be the first instance of its recording or public performance. To be considered a research output, the work must be formally published, performed, or otherwise disseminated.
Dataset	A structured collection of data created or curated as part of research. To be considered a research output, the dataset must be of notable quality and contribute meaningful value to the research. It must be known to exist and made available through some form of publication, repository, or dissemination for reuse or replication.
Design	A creative output resulting from visual, industrial, or architectural design processes. This may include conceptual, functional, or aesthetic work that demonstrates originality and contributes meaningfully to research or practice. To be considered a research output, the design must be formally documented, exhibited, published, or otherwise disseminated in a way that makes its contribution known and accessible.
Exhibition	A curated public presentation of creative or scholarly work, typically displayed in galleries, museums, or other formal venues. Exhibitions showcase original contributions and are designed to engage audiences through visual, spatial, or experiential formats. To be considered a research output, the exhibition must be publicly accessible, documented, and contribute notable value to its field or discipline.
Figure	A standalone visual representation used in scholarly communication to illustrate, clarify, or support research findings. This may include graphs, diagrams, images, maps, or other visual formats that convey data, concepts, or creative insights. To be considered a research output, the figure must be original, formally published or disseminated, and contribute notable value to the understanding or interpretation of the research.
Fileset	A curated collection of related digital files grouped together to support or document research. This may include datasets, code, documentation, multimedia, or other file types that collectively contribute to a research output. To be considered a research output, the fileset must be formally published or deposited in a recognised repository, be accessible for reuse or citation, and add notable value to the research. Unlike a dataset, which typically consists of structured data intended for analysis or replication, a fileset may encompass a broader range of materials that support or contextualise the research.
Internet Publication	A work published online that presents original research, commentary, or creative content through digital platforms. This may include blog posts, web articles, digital magazine entries, or other web-based formats. To be considered a research output, the publication must be publicly accessible, formally disseminated (e.g. hosted on recognised platforms, with editorial oversight), and contribute notable value to its field, audience, or area of practice. Some form of quality control – such as editorial

Type	Definition
	oversight, peer review, or institutional endorsement – is expected to ensure the integrity and credibility of the content.
Media	Audio, video, or multimedia content created by the researcher as part of research or creative practice. This may include interviews, documentaries, podcasts, or other time-based or interactive formats that convey original insights or creative work. To be considered a research output, the media must be formally published or disseminated, demonstrate intellectual or creative merit, and contribute notable value to its field or audience. Media outputs should be standalone works and not simply contributions to external news reports or journalistic coverage.
Other	A category for research or creative outputs that do not fit within standard classifications but still represent original, meaningful contributions. This may include largely non-verbal, oral, written, or media-based works not elsewhere classified; informal or internal contributions such as communication, knowledge transfer, expression, decision-making, or action; and contributions to external outputs that are not captured by conventional categories. To be considered a research output, the work must be documented, accessible, and demonstrate intellectual, creative, or practical value to its intended audience or field.
Patent	A formal intellectual property right granted for an invention, providing exclusive legal protection and recognition of originality. This category may also include related outputs such as trademarks, licences, copyrights, invention disclosures, and plant variety rights. To be considered a research output, the item must be officially registered or documented, publicly accessible or citable, and contribute notable value to innovation, research, or practice.
Performance	A live or recorded artistic presentation that demonstrates original creative practice or research. This may include theatre, dance, music, spoken word, or other performative forms. To be considered a research output, the performance must be formally documented, publicly accessible through presentation or recording, and contribute notable value to its field, audience, or area of inquiry.
Presentation	A spoken or visual communication of research, creative work, or scholarly insight delivered at a conference, seminar, workshop, or public event. This may include slide decks, oral talks, or other formats designed to share original contributions with an audience. To be considered a research output, the presentation must be formally documented, publicly accessible or citable, and contribute notable value to its field, audience, or area of practice. **Note:** A presentation differs from a performance in that it primarily conveys information, analysis, or commentary, often in a structured or academic format. While a performance is typically an artistic or creative enactment intended to be experienced as a work-in-itself, a presentation is more often explanatory or discursive, serving to communicate or contextualise research rather than embody it.
Poster	A visual summary of research, creative work, or scholarly insight, typically displayed at academic conferences, symposia, or public events. Posters use visual elements – such as text, graphics, and figures – to communicate key findings or concepts in a

Type	Definition

concise and accessible format. To be considered a research output, the poster must be formally documented, publicly presented or disseminated, and contribute notable value to its field or audience.

Note: A poster differs from a presentation in that it is primarily a static, visual medium designed for display and individual engagement, rather than a spoken or interactive delivery. While presentations often involve real-time explanation or discussion, posters are intended to stand alone and convey their message independently.

Report

A formal written account presenting research findings, analysis, or recommendations, typically produced by academic, government, industry, or organisational bodies. Reports may include technical documentation, policy analysis, evaluation studies, or commissioned research. To be considered a research output, the report must be publicly accessible or formally disseminated, and contribute notable value to its field, audience, or area of practice.

Note: Reports differ from other written outputs such as journal articles or books in that they are often tailored to specific stakeholders, may follow institutional or organisational formats, and are frequently intended to inform decision-making, policy, or practice.

Scholarly Edition

A critically edited and annotated version of an existing text, produced through rigorous scholarly research and editorial practice. Scholarly editions often include commentary, contextual analysis, variant readings, and supporting materials that enhance understanding of the original work. To be considered a research output, the edition must be formally published, demonstrate intellectual or creative merit, and contribute notable value to its field or discipline.

Note: A scholarly edition differs from a book in that its primary focus is on presenting and interpreting an existing text, rather than delivering original content in the form of a monograph or edited volume. The scholarly contribution lies in the editorial process, critical apparatus, and contextual framing that support the source material.

Software / Code

A computer program, script, or software package developed as part of research or creative practice. This output may include executable tools, libraries, algorithms, or source code that enables analysis, modelling, simulation, or interaction. To be considered a research output, the software or code must be formally documented, publicly accessible or disseminated, and contribute notable value to its field, methodology, or application.

Note: Software / Code differs from a **Dataset**, which consists of structured data intended for analysis or replication, and from a **Fileset**, which is a broader collection of related files (e.g. data, documentation, media) grouped for reuse or citation. Software / Code represents functional logic or computational processes, often enabling or embodying the research itself. Formal documentation should include version control, licensing information, and hosting in recognised repositories (e.g. GitHub, GitLab, institutional platforms) to support transparency, reuse, and citation.

Type	Definition
Thesis / Dissertation	A substantial, original written work submitted in fulfilment of the requirements for an academic degree, typically at the postgraduate level. Theses and dissertations present independent research, critical analysis, or creative practice, and are subject to formal examination and institutional approval. To be considered a research output, the work must be documented, publicly accessible (where applicable), and contribute notable value to its field or discipline. **Note:** A thesis or dissertation differs from a book in that it is primarily produced for academic qualification, often under supervision, and follows specific institutional formatting and submission requirements. While a book is typically intended for broader publication and readership, a thesis/dissertation is a formal academic document that may later be adapted into other outputs.
Preprint	A version of a scholarly paper that is shared publicly prior to formal peer review and publication. Preprints are typically hosted on recognised repositories and allow early dissemination of research findings, methods, or commentary. To be considered a research output, the preprint must be documented, publicly accessible, and contribute notable value to its field or discipline. **Note:** A preprint differs from a formally published journal article in that it has not undergone peer review or editorial processes associated with a traditional publication.

As seen above, publication records encompass a diverse range of outputs, each with distinct characteristics and metadata requirements. To support clarity and consistency in how these records are presented, NZRIS groups them according to shared field structures. This approach enables data providers to easily identify and populate relevant attributes for each publication type, while maintaining alignment with the broader schema. The following tables illustrate the grouped field sets used to represent different types of publication record.

The tables below provide an overview of the available fields for each record type. More specific and detailed information is available in the Ingestion Template and Detailed Field Information sections below.

"[M]" indicates that the field is mandatory for that data type.

Publication Record Overview (Book, Chapter, Conference, Journal Article, Report, Scholarly Edition)

Book	Chapter	Conference	Journal Article	Report	Scholarly Edition
Access Type	Access Type	Access Type	Access Type		
Alternative Description (Publication)	Alternative Description (Publication)	Alternative Description (Publication)	Alternative Description (Publication)		
Alternative Title (Publication)	Alternative Title (Publication)	Alternative Title (Publication)	Alternative Title (Publication)		
Authors [M]	Authors [M]	Authors [M]	Authors [M]	Authors [M]	Authors [M]
	Book Title [M]			Report Title	
	Chapter Number		Article Number	Report Number	
		Conference Finish Date			
		Conference Place	Country		
		Conference Start Date			
Description (Publication)	Description (Publication)	Description (Publication)	Description (Publication)	Abstract	Abstract
DOI	DOI	DOI	DOI	DOI	DOI
Edition	Edition		Edition		
Editors	Editors	Editors	Editors		
Funding Source	Funding Source	Funding Source	Funding Source	Funding Source	Funding Source
ISBN-10	ISBN-10	ISBN-10		ISBN-10	ISBN-10
ISBN-13	ISBN-13	ISBN-13		ISBN-13	ISBN-13
		ISSN	ISSN	ISSN	
		Issue	Issue		
Keywords	Keywords	Keywords	Keywords	Keywords	Keywords
Medium	Medium	Medium	Medium	Medium	Medium
		Name of Conference			
Notes	Notes	Notes	Notes	Notes	Notes
Output Language	Output Language	Output Language	Output Language		
Pagination	Pagination	Pagination	Pagination	Pagination	Pagination
Place of Publication	Place of Publication	Place of Publication		Place of Publication	
Production Date [M]	Production Date [M]	Production Date	Production Date [M]	Publication Date	Publication Date
		Published Proceedings	Journal [M]		
Publisher	Publisher	Publisher	Publisher	Publisher	Publisher
Series	Series				

Book	Chapter	Conference	Journal Article	Report	Scholarly Edition
Title (Publication) [M]	Title (Publication) [M]	Title (Publication) [M]	Title (Publication) [M]	Title (Publication) [M]	Title (Publication) [M]
URL	URL	URL	URL	Publisher URL	Publisher URL
Volume	Volume	Volume	Volume		

Publication Record Overview (Artefact, Composition, Design, Exhibition, Performance)

Artefact	Composition	Design	Exhibition	Performance
Abstract	Abstract	Abstract	Abstract	Abstract
Authors [M]	Authors [M]	Authors [M]	Authors [M]	Authors [M]
			End Date (Publication)	End Date (Publication)
Funding Source	Funding Source	Funding Source	Funding Source	Funding Source
Keywords	Keywords	Keywords	Keywords	Keywords
Location [M]			Venue [M]	Place of Performance
Medium	Medium	Medium	Medium	Medium
Notes	Notes	Notes	Notes	Notes
Publication Date	Publication Date	Publication Date		
Publisher URL	Publisher URL	Publisher URL	Publisher URL	Publisher URL
			Start Date (Publication)	Start Date (Publication)
Title (Publication) [M]	Title (Publication) [M]	Title (Publication) [M]	Title (Publication) [M]	Title (Publication) [M]

Publication Record Overview (Fileset, Figure, Media, Presentation, Poster)

Figure	Fileset	Media	Presentation	Poster
Authors [M]	Authors [M]	Authors [M]	Authors [M]	Authors [M]
Description (Publication)	Description (Publication)	Description (Publication)	Description (Publication) [M]	Abstract
DOI	DOI	DOI	DOI	
Funding Source	Funding Source	Funding Source	Funding Source	Funding Source
Keywords	Keywords	Keywords	Keywords	Keywords
		Medium		
Notes	Notes	Notes	Notes	Notes
				Presented At
			Presentation Date	Presentation Date [M]

			Presentation Location	
Title (Publication) [M]	Title (Publication) [M]	Title (Publication) [M]	Title (Publication) [M]	Title (Publication) [M]

Publication Record Overview (Dataset, Internet Publication, Patent, Preprint, Software / Code, Thesis / Dissertation)

Dataset	Internet Publication	Patent	Preprint	Software / Code	Thesis / Dissertation
		Application Number			
		Associated Authors			
		Awarded Date (Publication)			
Authors [M]	Authors [M]	Authors [M]	Authors [M]	Authors [M]	Authors [M]
Description (Publication)	Abstract	Abstract		Abstract	Abstract
DOI	DOI	DOI	DOI	DOI	
	eISSN				
		Expiry Date			
		Filed Date			Date Submitted
Funding Source	Funding Source	Funding Source	Funding Source	Funding Source	Funding Source
	ISSN				
Keywords	Keywords	Keywords	Labels (Publication)	Keywords	Keywords
	Medium	Medium		Medium	
Notes	Notes	Notes		Notes	Notes
		Patent Number			
		Patent Status			
				Place of Publication	
			Preprint Server		
					Presented At
	Publisher			Publisher	
Publication Date	Publication Date	Publication Date	Publication Date	Publication Date	Date Awarded
Publisher URL	Publisher URL	Publisher URL	Publisher URL	Publisher URL	Publisher URL
					Supervisors
		Territory			

Dataset	Internet Publication	Patent	Preprint	Software / Code	Thesis / Dissertation
Title (Publication) [M]	Title (Publication) [M]	Title (Publication) [M]	Title (Publication) [M]	Title (Publication) [M]	Title (Publication) [M]

Publication Type Links

As with other link types above, NZRIS defines a set of relationship types that link publications to users. These links apply only to individuals who are directly associated with grants or research funding reported to NZRIS. For people who are indirectly associated – such as co-authors who did not receive funding directly – their relationships to publications are captured separately using the **[Provider ID_Dataset #]_persons.csv** file. The following is a list of valid relationship types for connecting publication records within the system.
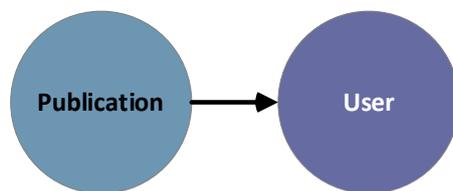
Link Type	Category id-1	Category id-1	Numeric Link Value
Authored by	Publication	User	8
Edited by	Publication	User	9
Translated by	Publication	User	82
Contributed to	Publication	User	92

User / Person Records

To meet the requirements of the New Zealand Privacy Act 2020, NZRIS deliberately limits the personal information collected about individuals. Where an individual has an ORCiD record, data providers are asked to use that ORCiD number as the primary identifier for that person. ORCID numbers are persistent identifiers that are publicly resolvable which are created and managed by individuals through the ORCID registry. Using ORCID as the primary identifier supports a privacy-minimising approach by removing the supply of organisation-specific person identifiers and their use is consistent with the Information Privacy Principles under the Privacy Act.

Where an ORCiD identifier is not available, data providers are asked to supply an alternative identifier (for example, a hashed or derived identifier), rather than providing an organisation-specific person identifier. The structure and constraints of this pseudo-identifier are outlined below. This approach avoids the disclosure of identifiable internal person identifiers while enabling consistent linkage of individual records across NZRIS datasets.

Alternative User Identifiers (Deterministic Hashed or Provider-Scoped)

A deterministic hashed identifier is created by applying a consistent cryptographic hash function to the same underlying input each time (for example, a stable combination of personal attributes held by the provider). Because the hashing process is deterministic, the same input will always produce the same output, allowing the identifier to be reused consistently for the same individual over time. The resulting value does not reveal the original input data and cannot be reversed without access to that data. Providers must ensure the same hashing method and inputs are used consistently to maintain persistence.

A provider-scoped opaque identifier is a randomly assigned value with no intrinsic meaning and no derivation from personal attributes or internal system identifiers. Examples include a randomly generated fixed-length alphanumeric string (e.g. A9F3KQ72M4X8PZ6C1R0WJ5TBNVYEDH), a UUID-derived value reformatted or truncated to fit the 32-character limit (e.g. 3f2a9c847a6b4d1eb39f81a72c5e90fd), or a neutral, system-generated token optionally prefixed to indicate submission scope only (e.g. NZRIS-7XQ4M9K2A8EJ6R1F3P5CWTUD). In all cases, the identifier must be created once per individual and reused consistently by the provider over time to support stable linkage across NZRIS datasets.

Directly and Indirectly Associated Individuals

Information about people can be provided to NZRIS in two ways. For those individuals that are directly associated to grant or publication records (i.e. project member or publication author funded by grant) relationships are established using a user metadata file and links. For individuals who are only indirectly associated to a grant but whose information is still useful, a separate ingest template is used (e.g. international collaborators, co-authors of a publication). The same role types are available for either approach however it is recommended that if an individual fulfils one of the available roles in the Role Type list then they should be considered a Directly Associated Individual.

Directly Associated Individuals ([Provider ID_Dataset #]_users.csv)

A directly associated individual is a person who holds a formal, documented role in the grant project. This includes those who are named in the grant application, receive funding, or contribute directly to the execution, management, or reporting of the grant. Almost all people involved in a grant are expected to fall under this definition. While NZRIS provides the option to capture indirectly associated individuals, it is anticipated that this information will rarely be needed or supplied by data providers.

Indirectly Associated Individuals ([Provider ID_Dataset #]_persons.csv)

An indirectly associated individual is a person who is contextually linked to the grant but does not hold a formal or funded role. Their association may arise through related outputs, institutional affiliation, or informal collaboration, without being named in the grant documentation. This may include additional authors on publications arising from the grant. NZRIS provides the option to capture these individuals; however, it is anticipated that this information will rarely be required or supplied.

The table below provides an overview of the available fields. More specific and detailed information is available in the Ingestion Template and Detailed Field Information sections below.

"[M]" indicates that the field is mandatory.

User Record Overview

User Type
Email *(data provider email)* [M]
First Name
Initials
Last Name [M]
Known As
Job Title
ORCiD
Organisation (User)
Organisation Address
Job Title
Protected (User) [M]
Role Type (*Indirectly Associated Individuals only*)
Proprietary_ID (*Unique Identifier*) [M]

Role Type Definition

Type	Definition
Administrator	A system or project-level role responsible for managing data, workflows, permissions, and reporting.
Clinical Evaluator	Provides expert assessment of specific aspects of a research study, which may include outcomes, data integrity, methodology, and participant safety. May contribute to determining the scope of research and evaluating the performance, efficacy, or validity of interventions or processes. Supports the research team by offering specialised insight that can influence study design, analysis, and interpretation of results. While critical to ensuring quality and rigor, this role does not hold overall accountability for the project.
Co-Investigator	Supports the Principal Investigator by contributing substantial intellectual input and leadership in specific aspects of the research. May

Type	Definition
	share responsibility for parts of the project's design, analysis, or reporting, but does not hold overall accountability for the project.
Co-Principal Investigator	A Co-Principal Investigator shares responsibility for the research project's design, governance, and compliance alongside the Principal Investigator. They contribute to strategic and scientific leadership and may be named on funding contracts and ethics approvals.
Co-Project Leader	A Co-Project Lead assists in managing the day-to-day delivery of the research project, coordinating activities, timelines, and resources with the Project Lead. They focus on operational tasks and team workflows but do not hold ultimate accountability for compliance or funding obligations.
Collaborator	A researcher or expert contributing to the project, often from another institution or discipline.
Consultant	Provides specialised advice or services (e.g. statistical analysis, technical expertise) but is not part of the core research team.
Key Personnel	Senior or key individuals critical to the project's success, often named in grant applications; includes investigators and other senior researchers.
Key Researcher	A Key Researcher, or Associate Investigator, who provides specialist expertise or performs defined research tasks within the project but does not have formal leadership or administrative authority. Their role is focused on delivering specific components rather than shaping the overall research direction.
Personnel	General term for individuals working on a project, including researchers, assistants, and technical staff.
PhD Candidate	A doctoral student who has completed coursework and passed qualifying exams, now engaged in dissertation research.
Postdoctoral Fellow	A researcher with a completed PhD undertaking advanced training and research.
Postgraduate Student	A student enrolled in a master's or other postgraduate programme (not as a doctoral candidate), contributing to research under supervision.
Principal Investigator	The Principal Investigator is the lead researcher with ultimate responsibility for the research project's design, governance, and compliance, including ethics and funder obligations. They provide strategic and scientific leadership, are named on funding contracts and approvals, and are accountable for reporting and dissemination.
Programme Co-Ordinator	Manages the operational aspects of a research programme, including scheduling, communications, and administrative support.
Programme Director	Provides strategic oversight and direction for a research programme, including funding, staffing, and long-term goals.

Type	Definition
Project Lead	The project lead manages the day-to-day delivery of the research project, coordinating activities, timelines, and resources to meet agreed milestones. They oversee operational tasks and team workflows but do not hold ultimate accountability for compliance or funding obligations.
Recipient	An individual awarded research funding who is not affiliated with an organisation and assumes full responsibility for delivering the funded work. They manage all aspects of the project, including compliance with funder requirements, reporting, and ethical obligations.
Research Assistant	Assists with research tasks under supervision, such as literature reviews, data entry, or fieldwork.
Researcher	A broad term for someone actively engaged in conducting research within the project.
Supervisor	A senior academic or researcher who provides oversight and mentorship to a student (e.g. PhD or Master's candidate). Supervisors are usually experienced researchers but are not part of the project's investigator team. Their role extends beyond academic guidance to include mentoring on professional development and advising on aspects such as grant management and project administration. While they support and advise on managing the research environment, they do not directly participate in the research activities or contribute to project outputs.
Technician	Supports the research through technical tasks such as lab work, equipment maintenance, or data collection.

User Type Links

As per the types in the section above, NZRIS captures the roles of individuals associated with research grants and contracts through a defined set of user type links. These links reflect the nature of each person's involvement in the funding arrangement, such as being a Principal Investigator, Co-Investigator, or Project Administrator. The relationships are sourced directly from the grant or contract records submitted to NZRIS, ensuring consistency and traceability across the system. The following section outlines the valid link types used to link Users to Grant records.
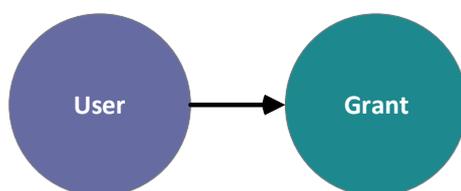
Link Type	Category id-1	Category id-2	Numeric Link Value
Administrator	User	Grant	141
Clinical Evaluator	User	Grant	133
Co-Investigator	User	Grant	122
Co-Project Leader	User	Grant	119
Collaborator	User	Grant	126

Consultant	User	Grant	125
Co-Principal Investigator	User	Grant	121
Key Researcher	User	Grant	44
Key Personnel	User	Grant	97
Personnel	User	Grant	117
PhD Candidate	User	Grant	95
Postdoctoral Fellow	User	Grant	96
Postgraduate Student	User	Grant	43
Principal Investigator	User	Grant	120
Programme Co-Ordinator	User	Grant	136
Programme Director	User	Grant	137
Project Lead	User	Grant	118
Recipient	Grant	User	17
Research Assistant	User	Grant	134
Researcher	User	Grant	138
Supervisor	User	Grant	135
Technician	User	Grant	139

Data Submission Overview

Overview of Ingestion Process

The NZRIS data ingestion process is designed to ensure the accurate and consistent integration of research-related data from providers into the NZRIS system. Data providers are required to prepare and format their data into a series of structured CSV files, each corresponding to a specific data domain. These include files containing information on users, grants and contracts, funds and funding rounds, publications, and relationships between categories. Once prepared, these files are submitted via a secure SFTP connection to the NZRIS system. Upon receipt, an automated validation process checks the data against the structural and content requirements outlined in this document. Data that meets the validation criteria is ingested into the NZRIS system for further processing and integration. If any issues are identified during validation, the affected files are returned to the data provider via the same secure SFTP channel, accompanied by detailed error reports to support correction and resubmission. This process ensures that all data entering NZRIS is accurate, complete, and aligned with the national data standards.

Required data files

The submission process to ingest data into NZRIS requires the creation of one or more comma-separated value (.csv) files, depending on the role of the organisation and the type of information being submitted. These may include:

- [ProviderID_Dataset#]_grants.csv
- [ProviderID_Dataset#]_equipment.csv
- [ProviderID_Dataset#]_links.csv
- [ProviderID_Dataset#]_users.csv
- [ProviderID_Dataset#]_publications.csv
- [ProviderID_Dataset#]_collaborating-organisations.csv

Note: Not all files are required for every submission. The required files depend on the nature of the data being supplied.

In addition to the core submission files, the following supplementary templates are also available:

- [ProviderID_Dataset#]_organisations.csv – used to provide metadata for organisations that are not listed in the Research Organisation Registry (ROR) but are referenced elsewhere in the submission (for example, as grant recipients or collaborating organisations).
- [ProviderID_Dataset#]_persons.csv – used to record indirectly associated individuals (for example, publication co-authors) who are not grant recipients and are not otherwise recorded in [ProviderID_Dataset#]_users.csv.

Use of the _organisations.csv template

The _organisations.csv template is used to provide metadata for organisations that are not currently listed in the Research Organisation Registry (ROR) but are referenced elsewhere in a submission. This file supplies descriptive and identifier information (for example, organisation name, address details, and NZBN where available) that enables consistent identification and linkage within NZRIS.

Both the _grants.csv and _collaborating-organisations.csv templates may reference organisations that are not present in ROR. In these cases:

- The organisation's name and identifier should be provided in the relevant field (for example, the c-recipient-organisation column in _grants.csv), and
- The full organisation details must be provided in the _organisations.csv file.

For example, if New Zealand organisation 'Apple' is a recipient of a grant and does not have a ROR identifier, the organisation name and identifier should be supplied in the c-recipient-organisation column of _grants.csv, and the organisation's metadata (such as legal name, address, and NZBN) must be provided in _organisations.csv. The same approach applies where a non-ROR organisation appears as a collaborating organisation.

The use of the _organisations.csv template is expected to be infrequent and is generally limited to situations where an organisation cannot be resolved to an existing ROR entry but must still be uniquely and consistently identified within NZRIS. Information about organisations without a ROR entry only needs to be provided the first time the organisation is supplied to NZRIS. For subsequent submissions, providers may reference the organisation using the same organisation name and identifier previously supplied via the _organisations.csv template.

File naming conventions

To ensure consistency and traceability across datasets, all data files should be prefixed with the **Data Provider ID** followed by the dataset ingest number or ingest date, using the following format: ProviderID_Dataset#(or date)_Grants.csv.

> For example, if the provider ID is ROY and the dataset ingest number is 05 or submission date is 31/3/2026, the file names should be: ROY_05_Grants.csv or ROY_20260331_Grants.csv.

This convention helps maintain clarity, supports version control, and simplifies identification of data sources during processing and analysis.

Validation

Detailed validation requirements for each file type and its associated fields are provided in the *Field Structure* section of this document. This section outlines the expected structure, data types, mandatory fields, formatting rules, and any conditional logic that must be followed to ensure successful ingestion into the NZRIS system. Data providers should refer to this section when preparing their CSV files to confirm that all required fields are present and correctly formatted. Adhering to these specifications is essential for passing the automated validation process and avoiding delays in data processing.

As part of the NZRIS ingestion process, each submitted file undergoes a series of automated validation checks to ensure data quality, consistency, and compliance with the defined standards. These checks include verifying that field values conform to the specified data types (e.g. text, date, integer), that values fall within defined size limits, and that date fields are within valid and logical ranges. The process also confirms that all mandatory fields are present and populated, and that any values referencing controlled code sets (e.g. classification codes, roles, or types) match the approved formats and permitted values. Additionally, the system checks for duplicate records, validates relationships between linked records (e.g. ensuring referenced IDs exist in related files), and enforces formatting rules for specific entry fields. These validations are critical to ensuring that the data can be reliably integrated into the NZRIS system and used for analysis and reporting.

Data Preparation / Ingestion into NZRIS

This section provides guidance for data providers on how to prepare and structure their data for ingestion into the NZRIS system. While the ingest template presents a streamlined set of standardised fields, it is important to note that these fields may consolidate data from multiple source systems or record types. In such cases, data providers should map their source data to the appropriate ingest fields based on the context of each record. Specific instructions are provided for fields where multiple source names (e.g. "Venue", "Territory", "Conference Place") correspond to a single ingest field (e.g. "Location"). These instructions are designed to ensure consistency, accuracy, and interoperability across diverse data sources. Providers are encouraged to review the field-level notes carefully and apply the appropriate mappings and transformations as outlined.

Data is supplied across multiple .csv files, each corresponding to a specific data type. The _grants.csv, _equipment.csv, and _publications.csv files contain the core descriptive information for each record – such as grant number, title, funding amount, fund name, and publication details – serving as the primary reference for understanding the record's context. The _links.csv file is used to define relationships between records, enabling connections across entities and datasets. Information about individuals associated with funding is captured in both the _users.csv (intended for Directly Associated Individuals) and _persons.csv (intended for Indirectly Associated Individuals) files.

The following section provides detailed guidance on the required structure for each ingest template. Each template is addressed individually and includes all mandatory columns, the specific details needed within each column, and links to comprehensive field-level information located at the end of this document. This cross-referencing is intended to support accurate field selection and ensure alignment with NZRIS data standards. Data providers should use these mappings to verify that their source data is correctly structured and semantically consistent with the ingest requirements.

To ensure successful ingestion into the NZRIS system, data providers must structure each .csv file using the exact column names and order specified in the following lists. The column headers in your file must match the field names provided – both in spelling and sequence – without modification. This consistency is critical for automated processing and validation. Where applicable, field-level notes and mapping references should be reviewed to confirm correct alignment with source data. This approach supports consistent formatting and ensures compatibility with NZRIS processing requirements.

The ingest template instructions provided in this data dictionary are accurate as at **18 May 2026**. These *.csv files represent the current structure and requirements for data submission to NZRIS. Please note that updates or refinements may occur over time to maintain alignment with evolving standards and practices. The NZRIS GitHub repository is the authoritative source for the latest versions of ingest templates and the associated instructions for creating datasets. Users are encouraged to check the repository to ensure they are working with the most up-to-date resources. (New Zealand Research Information System (NZRIS) · GitHub)

[Provider ID_Dataset #]_grants.csv

The grants.csv file is used to collect and organise key information about grants, contracts, and payments. It captures details such as titles and descriptions, financial values, and important dates including award, start, and end dates. <u>All columns are required</u>.

Column 1.   **id**   *Mandatory*

For grant type records the 'funder-reference' field must match id
For c-contract type records the 'c-contract-reference' field must match id
For c-payment type records the 'c-payment-reference' field must match id
For c-devolved type records the 'c-contract-reference' field must match id

Applicable Types: All
Definition: A unique identifier assigned to each individual record
Detailed Field Information: **ID**

Column 2.   **type**   *Mandatory*

Applicable Types: All
Definition: Classification field that identifies the type of record within the Category
Allowed Values: "grant", "c-contract", "c-payment", "c-devolved"
Detailed Field Information: **Type (Grant)**

Column 3.   **category**   *Mandatory*

Applicable Types: All
Definition: Classification field that identifies the Category the record belongs to
Allowed Values: "grant"
Detailed Field Information: **Category**

Column 4.   **c-protected**   *Mandatory*

Applicable Types: All
Definition: Indication of exclusion of record from NZRIS website
Detailed Field Information: **Protected (Grant)**

Column 5.   **title**   *Mandatory*

Applicable Types: Grant, c-contract, c-devolved
Definition: Main title or name
Detailed Field Information:
- Grant type: **Title (Grant)**
- c-contract type: **Name (Grant)**
- c-devolved type: **Name (Grant)**

Column 6.   **start-date**   *Mandatory for c-contract and c-devolved types only*

Applicable Types: All
Definition: Date on which the grant-funded activity or contract begins
Detailed Field Information: **Start Date (Grant)**

Column 7.   **end-date**   *Mandatory for c-contract and c-devolved types only*

Applicable Types: All
Definition: Date on which the grant-funded activity or contract is scheduled to conclude
Detailed Field Information: **End Date (Grant)**

Column 8.   **description**

Applicable Types: All
Definition: Details of the grant, contract, or payment
Detailed Field Information:
- Grant type: **Description (Grant)**   *Mandatory*
- c-contract type: **Summary**
- c-devolved type: **Summary**   *Mandatory*
- c-payment type: **Details**   *Mandatory*

Column 9.   funder   *Mandatory*

Applicable Types: All
Definition: Name of organisation providing the grant funding or distributing monies
Detailed Field Information:
- Grant type: **Funder Name**
- c-contract type: **Distributing Organisation**
- c-devolved type: **Distributing Organisation**
- c-payment type: **Distributing Organisation**

Column 10.   funder-reference

Applicable Types: Grant   *Mandatory for Grant type only – must match 'id' field above*
Definition: A unique identifier to identify a grant
Detailed Field Information: **Grant Reference**

Column 11.   c-associated-grant-reference

Applicable Types: c-contract
Definition: A unique identifier to identify an associated grant record
Detailed Field Information: **Associated Grant Reference**

Column 12.   amount-value   *Mandatory*

Applicable Types: All
Definition: The total monetary amount of the grant, contract, or payment
Detailed Field Information: **Value**

Column 13.   amount-currency-code   *Mandatory*

Applicable Types: All
Definition: The total monetary amount
Allowed Values: Fixed Code Set - See **Currency Codes**.
Detailed Field Information*:* **Currency Code**

Column 14.   award-date

Applicable Types:
- Grant   *Mandatory*
- c-payment   *Mandatory*

Definition: The date grant was awarded or payment made
Detailed Field Information:
- Grant type: **Award Date (Grant)**
- c-payment type: **Payment Date**

Column 15.   c-recipient-organisation

Applicable Types: All   *Mandatory for c-contract, c-payment, c-devolved types*
Definition: Name of organisation that receives and administers grant funding
Detailed Field Information: **Recipient Organisation**

Column 16.   labels

Applicable Types: Grant, c-contract, and c-devolved
Definition: Labels from defined code sets (e.g. ANZSRC)
Detailed Field Information: **Labels (Grant)**

Column 17.   c-contract-reference   *Mandatory for c-contract, c-payment, c-devolved types*
                                             - for c-contract and c-devolved types must match 'id' field above

Applicable Types: All
Definition: A unique identifier to identify a contract
Detailed Field Information: **Contract Reference**

Column 18.   c-parent-contract-reference

Applicable Types: c-contract, c-devolved, c-payment
Definition: A unique identifier to identify a parent contract
Detailed Field Information: **Parent Contract Reference**

Column 19.   c-funder-application-reference

Applicable Types: Grant
Definition: A unique identifier to identify an application
Detailed Field Information: **Application Reference**

Column 20.   c-title-language

Applicable Types: Grant
Definition: Language title written in, if not English
Detailed Field Information: **Title Language**

Column 21.   c-alternative-title

Applicable Types: Grant
Definition: Alternative title to that provided in title field (usually if title not in English)
Detailed Field Information: **Alternative Title (Grant)**

Column 22.   c-intended-outcome

Applicable Types: Grant, c-contract
Definition: Expected results or impacts
Detailed Field Information: **Intended Outcome**

Column 23.   c-description-language

Applicable Types: Grant
Definition: Language description written in, if not English
Detailed Field Information: **Description Language**

Column 24.   c-alternative-description

Applicable Types: Grant
Definition: Alternative title to that provided in description field (usually if Description not in English)
Detailed Field Information: **Alternative Description (Grant)**

Column 25.   constraints

Applicable Types: Grant, c-contract, c-devolved
Definition: Limitations, conditions, or requirements
Detailed Field Information: **Constraints**

Column 26.   c-payment-reference   *Mandatory for c-payment type only - must match 'id' field above*

Applicable Types: c-payment
Definition: A unique identifier to identify a payment
Detailed Field Information: Payment Reference

[Provider ID_Dataset #]_equipment.csv

The equipment.csv template is used to gather key information about the funds and funding rounds associated with research investments and grants. <u>All columns are required</u>.

Column 1.   id   *Mandatory*

Applicable Types: All
Definition: A unique identifier assigned to each individual record
Detailed Field Information: **ID**

Column 2.   type   *Mandatory*

Applicable Types: All
Definition: Classification field that identifies the type of record within the Category
Allowed Values: "c-fund", "c-scholarship", "c-internship", "c-fellowship", "c-on-demand", "c-negotiated", "c-other", "c-funding-round", "c-appropriation"
Detailed Field Information: **Type (Fund)**

Column 3.   category   *Mandatory*

Applicable Types: All
Definition: Classification field that identifies the Category the record belongs to
Allowed Values: "equipment"
Detailed Field Information: **Category**

Column 4.   name   *Mandatory*

Applicable Types: All
Definition: Main title or name
Detailed Field Information: **Name (Fund)**

Column 5.   c-protected   *Mandatory*

Applicable Types: c-fund, c-scholarship, c-internship, c-fellowship, c-on-demand, c-negotiated, c-other, c-funding-round
Definition: Indication of exclusion of record from NZRIS website
Detailed Field Information: **Protected (Fund)**

Column 6.   description

Applicable Types: All
Definition: Details of the fund, funding round, or appropriation
Detailed Field Information:

- c-fund, c-scholarship, c-internship, c-fellowship, c-on-demand, c-negotiated, c-other types: **Fund Description**
- c-funding-round type: **Funding Round Description**
- c-appropriation type: **Appropriation Description**

Column 7.   c-administering-organisation

Applicable Types: c-fund, c-scholarship, c-internship, c-fellowship, c-on-demand, c-negotiated, c-other
Definition: The organisation responsible for administering the funding <u>if not the funder</u>
Detailed Field Information: **Administering Organisation**

Column 8.   start-date

Applicable Types: c-fund, c-scholarship, c-internship, c-fellowship, c-on-demand, c-negotiated, c-other, c-appropriation
Definition: The establishment or start date of the fund or appropriation
Detailed Field Information:

- c-fund, c-scholarship, c-internship, c-fellowship, c-on-demand, c-negotiated, c-other types: **Establishment Date (Fund)**
- c-appropriation type: **Start Year**

Column 9.   finish-date

Applicable Types: c-fund, c-scholarship, c-internship, c-fellowship, c-on-demand, c-negotiated, c-other, c-appropriation

Definition: The disestablishment or end date of the fund or appropriation

Detailed Field Information:

- c-fund, c-scholarship, c-internship, c-fellowship, c-on-demand, c-negotiated, c-other types: **Disestablishment Date (Fund)**
- c-appropriation type: **End Year**

Column 10.   c-alternative-name

Applicable Types: c-fund, c-scholarship, c-internship, c-fellowship, c-on-demand, c-negotiated, c-other

Definition: An alternative name that the fund may also be known by

Detailed Field Information: **Alternative Name (Fund)**

Column 11.   c-allocation-method

Applicable Types: c-funding-round

Definition: The approach or process used to distribute funding

Allowed Values: "Contestable", "Negotiated", "On-demand", "Core-funding", "Targeted-Strategic"

Detailed Field Information: **Allocation Method**

Column 12.   c-vote

Applicable Types: c-appropriation

Definition: The name of the grouped appropriations

Detailed Field Information: **Vote**

[Provider ID_Dataset #]_links.csv

The links.csv template is used to record relationships between different categories and record types within the metadata system. <u>All columns are required</u>.

Column 1.   id-1   *Mandatory*
  Definition: The unique identifier of the originating record
  Detailed Field Information: **ID**

Column 2.   category-1   *Mandatory*
  Definition: The originating record type from which the linked record derives
  Allowed Values: "grant", "equipment", "publication", "user"
  Detailed Field Information: **Category**

Column 3.   source-1   *Mandatory*
  Definition: The data provider source identifier
  Allowed Values: "c-xxx" (where xxx is the three-character identifier for the data provider, e.g. c-MBE, c-ROY)
  <u>Note</u>: This value will be the three character identifier for the submitting data provider unless specific link is being made to records supplied by another data provider (subcontract records).

Column 4.   link-type-id   *Mandatory*
  Definition: The applicable numeric link type value
  Allowed Values: See **Link Values** section

Column 5.   id-2   *Mandatory*
  Definition: The unique identifier of the recipient record that is linked to the originating record
  Detailed Field Information: **ID**

Column 6.   category-2   *Mandatory*
  Definition: The recipient record type that is linked to the originating record
  Allowed Values: "grant", "equipment", "publication", "user"
  Detailed Field Information: **Category**

Column 7.   source-2   *Mandatory*
  Definition: The data provider source identifier
  Allowed Values: "c-xxx" (where xxx is the three-character identifier for the data provider, e.g. c-MBE, c-ROY)
  <u>Note</u>: This value will be the three character identifier for the submitting data provider unless specific link is being made to records supplied by another data provider (subcontract records).

Column 8.   privacy-level   *No data required*
  Definition: System field (not used by NZRIS)
  Allowed Values: Leave blank

[Provider ID_Dataset #]_users.csv

The users.csv template is used to collect information about individuals who are <u>directly associated</u> with research funding, such as grant recipients, collaborators, and other key contributors. Column headings must conform to the list below. <u>All columns are required</u>.

NOTE - unlike other ingest templates the column headings for Users require square brackets.

Column 1.   [Title]
Definition: The honorific or courtesy title associated with an individual
Detailed Field Information: **Title (User)**

Column 2.   [Initials]
Definition: The middle initials of the user
Detailed Field Information: **Initials**

Column 3.   [Firstname]
Definition: The first name of the user
Detailed Field Information: **First Name**

Column 4.   [Lastname]   *Mandatory*
Definition: The family name or surname of the user
Detailed Field Information: **Last Name**

Column 5.   [KnownAs]
Definition: The name the individual prefers to be known as
Detailed Field Information: **Known As**

Column 6.   [Suffix]
Definition: The generational or professional suffix associated with a name
Detailed Field Information: **Suffix**

Column 7.   [Email]   *Mandatory*
Definition: A generic email address required for NZRIS system purposes only
Detailed Field Information: **Email**

Column 8.   [AuthenticatingAuthority]   *Mandatory*
Definition: System field only
Allowed value: "Internal"
Detailed Field Information: **Authenticating Authority**

Column 9.   [Username]   *Mandatory*
Definition: System field not used by NZRIS
Allowed value: Should replicate the [Proprietary_ID]
Detailed Field Information: **Username**

Column 10.   [Proprietary_ID]   *Mandatory*
Definition: A unique identifier assigned to each user record
Detailed Field Information: **Proprietary_ID**

Column 11.   [PrimaryGroupDescriptor]   *Mandatory*
Definition: The short code of the data provider
Detailed Field Information: **Primary Group Descriptor**

Column 12.   [IsAcademic]   *Use only "TRUE" or "FALSE"*
Definition: System field (not used by NZRIS) to indicate whether the user is an academic staff member
Allowed values: "TRUE" or "FALSE"

Column 13.   Protected[Generic01]   *Mandatory*
Definition: Whether the record should be excluded from the NZRIS website
Detailed Field Information: **Protected (User)**

Column 14.   ORCID[Generic02]

Definition: The ORCiD ID associated with the user record
Detailed Field Information: **ORCiD**

Column 15.   Organisation[Generic03]

Definition: The organisation the user is associated with
Detailed Field Information: **Organisation (User)**

Column 16.   Job Title[Generic04]

Definition: The job title of the user
Detailed Field Information: **Job Title**

Column 17.   Affiliation ROR[Generic48]

Definition: The ROR identifier for the user's affiliated organisation
Detailed Field Information: **Affiliation ROR**

Column 18.   Affiliation GRID[Generic49]

Definition: The GRID identifier for the user's affiliated organisation
Detailed Field Information: **Affiliation GRID**

Column 19.   Affiliation NZBN[Generic50]

Definition: The NZBN identifier for the user's affiliated organisation
Detailed Field Information: **Affiliation NZBN**

[Provider ID_Dataset #]_publications.csv

The publications.csv template is used to capture information about published research outputs that result from grant funding. <u>All columns are required</u>.

Column 1.   id   *Mandatory*

    Applicable Types: All
    Definition: A unique identifier assigned to each individual record
    Detailed Field Information: **ID**

Column 2.   type   *Mandatory*

    Applicable Types: All
    Definition: Classification field that identifies the type of record within the Category
    Allowed Values: ""book", "chapter", "conference", "journal-article", "artefact", "composition", "dataset", "design", "exhibition", "figure", "fileset", "internet-publication", "media", "other", "patent", "performance", "presentation", "poster", "report", "scholarly-edition", "software", "thesis-dissertation", "preprint""
    Detailed Field Information: **Type (Publication**)

Column 3.   category   *Mandatory*

    Applicable Types: All
    Definition: Classification field that identifies the Category the record belongs to
    Allowed Values: "publication"
    Detailed Field Information: **Category**

Column 4.   title   *Mandatory*

    Applicable Types: All
    Definition: The title of the research output
    Detailed Field Information: **Title (Publication)**

Column 5.   publication-date

    Applicable Types: artefact, book, composition, dataset, chapter, conference, design, internet publication, journal article, other, patent, preprint, presentation, poster, report, scholarly edition, software/code, thesis/dissertation
    Definition: The date on which the output is formally published or made publicly accessible
    Detailed Field Information:

- Artefact type: **Publication Date**
- Book type: **Production Date**   *Mandatory*
- Composition type: **Publication Date**
- Dataset type: **Publication Date**
- Chapter type: **Production Date**   *Mandatory*
- Conference Type: **Production Date**
- Design type: **Publication Date**
- Internet Publication type: **Publication Date**
- Journal Article type: **Production Date**   *Mandatory*
- Other type: **Publication Date**
- Patent type: **Publication Date**
- Preprint type: **Publication Date**
- Presentation type: **Presentation Date**
- Poster type: **Presentation Date**   *Mandatory*
- Report type: **Publication Date**
- Scholarly Edition type: **Publication Date**
- Software / Code type: **Publication Date**
- Thesis / Dissertation type: **Date Awarded**

Column 6.   journal

    Applicable Types: conference, journal article, other

Definition: The full title of the journal or conference proceedings
Detailed Field Information:

- Conference type: **Published Proceedings**
- Journal article type: **Journal**   *Mandatory*
- Other type: **Journal**

Column 7. volume

Applicable Types: book, chapter, conference, journal article, other
Definition: The numbered or named grouping of a published work that indicates its place within a larger series or collection
Detailed Field Information: **Volume**

Column 8. issue

Applicable Types: conference, journal article, other
Definition: The specific number, label, or designation of a journal, periodical, or conference proceedings
Detailed Field Information: **Issue**

Column 9. number

Applicable Types: book, chapter, article, report
Definition: The applicable identifying number related to the output
Detailed Field Information:

- Book type: **Chapter Number**
- Chapter type: **Chapter Number**
- Journal Article type: **Article Number**
- Report type: **Report Number**

Column 10. pagination-full

Applicable Types: book, chapter, conference, journal article, report, scholarly article, other
Definition: The page range or page count
Detailed Field Information: **Pagination**

Column 11. name-of-conference

Applicable Types: conference, presentation
Definition: The name of the conference or place where presentation given
Detailed Field Information:

- Conference type: **Name of Conference**
- Presentation type: **Presented At**

Column 12. location

Applicable Types: conference, artefact, journal article, exhibition, performance, presentation, other, patent
Definition: The location applicable to the output type
Detailed Field Information:

- Conference type: **Conference Place**
- Artefact type: **Location**   *Mandatory*
- Journal Article type: **Country**
- Exhibition type: **Venue**   *Mandatory*
- Performance type: **Place of Performance**
- Presentation type: **Presentation Location**
- Other type: **Location**
- Patent type: **Territory**

Column 13. start-date

Applicable Types: conference, exhibition, performance, other, patent
Definition: The start date applicable to the output type
Detailed Field Information:

- Conference type: **Conference Start Date**
- Exhibition type: **Start Date (Publication)**

- Performance type: **Start Date (Publication)**
- Other type: **Start Date (Publication)**
- Patent type: **Awarded Date (Publication)**

Column 14.   finish-date

Applicable Types: conference, exhibition, performance, other, patent
Definition: The end date applicable to the output type
Detailed Field Information:
- Conference type: **Conference Finish Date**
- Exhibition type: **Finish Date**
- Performance type: **Finish Date**
- Other type: **Finish Date**
- Patent type: **Expiry Date**

Column 15.   parent-title

Applicable Types: chapter, preprint, report
Definition: The full title of the output
Detailed Field Information:
- Chapter type: **Book Title**   *Mandatory*
- Preprint type: **Preprint Server**
- Report type: **Report Title**

Column 16.   publisher

Applicable Types: book, chapter, conference, journal article, internet publication, other, report, scholarly edition, software/code
Definition: The individual, organisation, or entity responsible for producing, distributing, or making a research output publicly available
Detailed Field Information: **Publisher**

Column 17.   edition

Applicable Types: book, chapter, journal article, other
Definition: The published edition assigned to a research output
Detailed Field Information: **Edition**

Column 18.   series

Applicable Types: book, chapter, other
Definition: The named collection or sequence of related works published under a common title or theme
Detailed Field Information: **Series**

Column 19.   place-of-publication

Applicable Types: book, chapter, conference, report, other, software/code
Definition: The city or location where the publisher or issuing organisation is based
Detailed Field Information: **Place of Publication**

Column 20.   medium

Applicable Types: book, chapter, conference, journal article, report, scholarly article, other, artefact, composition, design, exhibition, performance, media, patent, software/code, internet publication
Definition: The format, material, or delivery method through which a research output is created, presented, or made accessible
Detailed Field Information: **Medium**

Column 21.   filed-date

Applicable Types: patent, thesis/dissertation
Definition: The date the output was filed or submitted
Detailed Field Information:
- Patent type: **Filed Date**
- Thesis/Dissertation type: **Date Submitted**

Column 22.   patent-number

Applicable Types: patent
Definition: The unique identifying number that applies to the patent
Detailed Field Information: Patent Number

Column 23.   patent-status

Applicable Types: patent
Definition: The status of the patent application at the time data provided to NZRIS
Detailed Field Information: Patent Status

Column 24.   doi

Applicable Types: book, chapter, conference, journal article, report, scholarly edition, fileset, figure, other, media, presentation, preprint, dataset, patent, software/code, internet publication
Definition: The unique alphanumeric string assigned to a research output
Detailed Field Information: DOI

Column 25.   publisher-url

Applicable Types: artefact, book, composition, chapter, conference, dataset, design, exhibition, internet publication, journal article, other, patent, performance, preprint, report, scholarly edition, software/code, thesis/dissertation
Definition: The date on which the output is formally published or made publicly accessible
Detailed Field Information:

- Artefact type: **Publisher URL**
- Book type: **URL**
- Composition type: **Publisher URL**
- Chapter type: **URL**
- Conference Type: **URL**Error! Reference source not found.
- Dataset type: **Publisher URL**
- Design type: **Publisher URL**
- Exhibition type: **Publisher URL**
- Internet Publication type: **Publisher URL**
- Journal article type: **URL**
- Other type: **Publisher URL**
- Patent type: **Publisher URL**
- Performance: **Publisher URL**
- Preprint type: **Publisher URL**
- Report type: **Publisher URL**
- Scholarly Edition: **Publisher URL**
- Software / Code type: **Publisher URL**
- Thesis / Dissertation type: **Publisher URL**

Column 26.   abstract

Applicable Types: All
Definition: A description applicable to the output type
Detailed Field Information:

- Artefact type: **Abstract**
- Book type: **Description (Publication)**
- Composition type: **Abstract**
- Dataset type: **Description (Publication)**
- Chapter type: **Description (Publication)**
- Conference Type: **Description (Publication)**
- Design type: **Abstract**
- Exhibition type: **Abstract**
- Figure type: **Description (Publication)**
- Fileset type: **Description (Publication)**

- Internet Publication type: **Abstract**
- Journal article type: **Description (Publication)**
- Media type: **Description (Publication)**
- Other type: **Abstract**
- Patent type: **Abstract**
- Performance type: **Abstract**
- Presentation type: **Description (Publication)**   *Mandatory*
- Poster type: **Abstract**
- Report type: **Abstract**
- Scholarly Edition: **Abstract**
- Software type: **Abstract**
- Thesis / Dissertation type: **Abstract**

Column 27.   keywords

Applicable Types: All
Definition: Keywords associated with the output to facilitate grouping
Detailed Field Information: **Keywords**

Column 28.   notes

Applicable Types: All
Definition: Additional contextual, explanatory, or clarifying information about a research output not covered by other structured fields.
Detailed Field Information: **Notes**

Column 29.   language

Applicable Types: chapter, conference, journal article, preprint, other
Definition: The language in which the publication or output is written
Detailed Field Information: **Output Language**

Column 30.   isbn-10

Applicable Types: book, chapter, conference, report, scholarly edition, other
Definition: The unique ISBN-10 string assigned to a research output
Detailed Field Information: **ISBN-10**

Column 31.   isbn-13

Applicable Types: book, chapter, conference, report, scholarly edition, other
Definition: The unique ISBN-13 string assigned to a research output
Detailed Field Information: **ISBN-13**

Column 32.   issn

Applicable Types: conference, journal article, internet publication, report, other
Definition: The unique ISSN string assigned to a research output
Detailed Field Information: **ISSN**

Column 33.   eissn

Applicable Types: conference, journal article, internet publication, other, report
Definition: The unique eISSN string assigned to a research output
Detailed Field Information: **eISSN**

Column 34.   open-access-status

Applicable Types: chapter, conference, journal article
Definition: Classification of a research output based on its availability to users
Detailed Field Information: **Access Type**

Column 35.   c-alternative-title

Applicable Types: chapter, conference, journal article
Definition: Alternative title if title is not in English
Detailed Field Information: **Alternative Title (Publication)**

Column 36.   c-alternative-description

Applicable Types: chapter, conference, journal article
Definition: Alternative description if description is not in English
Detailed Field Information: **Alternative Description (Publication)**

Column 37.   c-protected

Applicable Types: All
Definition: Indication of exclusion of record from NZRIS website
Detailed Field Information: **Protected (Publication)**

Column 38.   c-funding-source-reference

Applicable Types: All
Definition: The source of funding for the research output
Detailed Field Information: **Funding Source**

[Provider ID_Dataset #]_collaborating-organisations.csv

The _collaborating-organisations.csv template is used to capture information about organisations that collaborate in funded research activities. Where a collaborating organisation cannot be resolved to an existing ROR entry, its metadata must be supplied via the _organisations.csv template on first submission. Once provided, the same organisation name and identifier should be reused in subsequent submissions. All columns are required.

Important note on updating collaborating organisation information

For collaborating organisations, each dataset submission replaces any previously submitted collaborating organisation information for the same record. NZRIS does not merge or append collaborating organisation data across submissions.

This means that if a change is required — for example, adding, removing, or correcting a collaborating organisation — data providers must re-submit **the full and complete list of collaborating organisations** for that record, including all organisations previously supplied as well as any new or amended entries, **and re-submit any associated grant records**.

If only partial information is provided in a subsequent submission, any collaborating organisations not re-supplied will be removed from the record.

Column 1. id   *Mandatory*
  Definition: The unique identifier of a grant record, as provided in the
  _grants.csv template, to which this collaborating organisation relates.
  Detailed Field Information: **ID**

Column 2. category   *Mandatory*
  Definition: Classification field that identifies the Category the record belongs to
  Allowed Values: "grant"
  Detailed Field Information: **Category**

Column 3. field-name   *Mandatory*
  Definition: Specifies the function/role of this record in relation to the identifier
  provided in column 1: id.
  Allowed Values: "c-collaborating-organisation"

Column 4. organisation   *Mandatory*
  Definition: The full name of the organisation
  Detailed Field Information: **Organisation (User)**

Column 5. sub-organisation   *No data required*
  Definition: Not used

Column 6. street-address
  Definition: The street address for the organisation
  Detailed Field Information: **Address (Persons)**

Column 7. city
  Definition: The city where the organisation is based
  Detailed Field Information: **Address (Persons)**

Column 8. state
  Definition: The state or region where the organisation is based
  Detailed Field Information: **Address (Persons)**

Column 9. zip-code
  Definition: The zip code or postal code for the organisation
  Detailed Field Information: **Address (Persons)**

**Column 10.	country**

Definition: The country where the organisation is based
Detailed Field Information: **Address (Persons)**

**Column 11.	identifiers**

Definition: The Organisation's unique Global Research Identifier Database ID, Research Organisation Registry Database ID, or the New Zealand Business Number allocated to the organisation
Detailed Field Information: **Identifiers**

[Provider ID_Dataset #]_persons.csv

The persons.csv template is used to capture information about individuals who are <u>indirectly associated</u> with research funding, such as editors and co-authors. <u>All columns are required</u>.

Important note on updating persons information

For <u>indirectly associated</u> persons information, each dataset submission replaces any previously submitted information for the same record. NZRIS does not merge or append indirectly associated persons data across submissions.

This means that if a change is required — for example, adding, removing, or correcting an indirectly associated person — data providers must re-submit **the full and complete list of persons** for that record, including all persons previously supplied as well as any new or amended entries **and re-submit any associated grant records**.

If only partial information is provided in a subsequent submission, any indirectly associated persons not re-supplied will be removed from the record.

Column 1.   id   *Mandatory*
    Definition: The unique identifier of a grant or publication record, as provided in the **_grants.csv* or **_publications.csv* templates, to which this person relates.
    Detailed Field Information: **ID**

Column 2.   category   *Mandatory*
    Definition: Classification field that identifies the Category the record belongs to
    Allowed Values: "grant" or "publication"
    Detailed Field Information: **Category**

Column 3.   field-name   *Mandatory*
    Definition: Specifies the function/role of this record in relation to the identifier provided in column 1: id.
    Allowed Values:
- Grant type - "researchers"
- publication type - "authors", "editors", "associated-author"

Column 4.   surname   *Mandatory*
    Definition: The family name or surname of an individual.
    Detailed Field Information: **Surname**

Column 5.   first-name
    Definition: The first name of the user
    Detailed Field Information: **First Name**

Column 6.   order-number   *No data required*
    Definition: Used to specify author order

Column 7.   orcid
    Definition: The ORCiD ID associated with the user record
    Detailed Field Information: **ORCiD**

Column 8.   organisation
    Definition: The full name of an organisation that the person is affiliated with
    Detailed Field Information: **Organisation (User)**

Column 9.   street-address
    Definition: The street address for the affiliated organisation
    Detailed Field Information: **Address (Persons)**

Column 10.   city

Definition: The city where the affiliated organisation is based
Detailed Field Information: **Address (Persons)**

Column 11.   state

Definition: The state or region where the affiliated organisation is based
Detailed Field Information: **Address (Persons)**

Column 12.   country

Definition: The country where the affiliated organisation is based
Detailed Field Information: **Address (Persons)**

Column 13.   zip-code

Definition: The zip code or postal code for the affiliated organisation
Detailed Field Information: **Address (Persons)**

[Provider ID_Dataset #]_organisations.csv

The _organisations.csv template is used to provide metadata for organisations that are not listed in the Research Organisation Registry (ROR) - Research Organization Registry (ROR) | Home - and are referenced elsewhere in a submission. Organisation details for non-ROR entities are required only on first submission to NZRIS. Once supplied, the same organisation name and identifier must be reused in subsequent datasets, unless the organisation's metadata has changed. All columns are required.

Column 1.   id   *Mandatory*
> *Applicable Types*: All
> *Definition*: A unique identifier assigned to each individual record
> *Detailed Field Information*: **ID**

Column 2.   type   *Mandatory*
> *Applicable Types*: All
> *Definition:* Classification field that identifies the type of record within the Category
> *Allowed Values*: "c-organisation"
> *Detailed Field Information:* **Type (Organisation)**

Column 3.   category   *Mandatory*
> *Applicable Types*: All
> *Definition:* Classification field that identifies the Category the record belongs to
> *Allowed Values:* "external-organisation"
> *Detailed Field Information*: **Category**

Column 4.   name   *Mandatory*
> *Definition:* The Organisation's name
> *Detailed Field Information*: **Organisation Name**

Column 5.   addresses   *Mandatory*
> *Definition:* Physical address of the organisation
> *Detailed Field Information*: **Address (Organisation)**

Column 6.   c-alternative-name
> *Definition:* Other officially recognised name
> *Detailed Field Information:* **Alternative Name (Organisation)**

Column 7.   aliases
> *Definition:* Other names or informal references
> *Detailed Field Information*: **Additional Aliases**

Column 8.   acronyms
> *Definition:* Abbreviated names or commonly known short-form names
> *Detailed Field Information*: **Acronyms**

Column 9.   url
> *Definition:* The name of any subsidiary organisation/s
> *Detailed Field Information*: **Website URL**

Column 10.   c-types
> *Definition:* The name of any subsidiary organisation/s
> *Allowed values*: See Organisation Types below
> *Detailed Field Information:* **Organisation Type**

Column 11.   identifiers
> *Definition:* The unique identifiers for the organisation.
> *Detailed Field Information*: **Identifiers**

Column 12.   established
> *Definition:* Organisation foundation date
> *Detailed Field Information:* **Establishment Date (Organisation)**

Column 13.   c-disestablishment-date

Definition: Organisation foundation date
Detailed Field Information: **Disestablishment Date (Organisation)**

Column 14.   parent-organisation-identifiers

Definition: The name of the parent organisation
Detailed Field Information: **Parent Organisation**

Column 15.   child-organisation-identifiers

Definition: The name of any subsidiary organisation/s
Detailed Field Information: **Subsidiary Organisation**

Column 16.   preceded-by-organisation-identifiers

Definition: The name of any predecessor organisation/s
Detailed Field Information: **Predecessor Organisation**

Column 17.   succeeded-by-organisation-identifiers

Definition: The name of any successor organisation/s
Detailed Field Information: **Successor Organisation**

Column 18.   related-organisation-identifiers

Definition: The name of any related organisation/s
Detailed Field Information: **Related Organisation**

Link Values

Relationships between records (both within a category and across categories) are created using a numbered "link". The order of the categories in the table is important when completing the ingestion template. For each link value, Category id-1 and Category id-2 indicate the expected position of the related categories. Data providers must provide the corresponding identifiers in the correct order. For example, if a relationship between a *funding round* and a *fund* is specified using link value 40, the *funding round* identifier must be entered in position 1 and the *fund* identifier in position 2. This ensures the relationship is correctly interpreted during ingestion.

The following is a list of available relationships:

Numeric Link Value	Link Type Usage	Category id-1	Category id-2
2	Publication resulting from Grant	Publication	Grant
8	Publication Author	Publication	User
9	Publication Editor	Publication	User
12	Contract to Payment	Grant *(Contract)*	Grant *(Payment)*
16	Grant (or contract) to Funding Round	Grant	Equipment *(Funding Round)*
17	Grant Recipient	Grant	User
40	Funding Round to Fund	Equipment *(Funding Round)*	Equipment *(Fund)*
43	Postgraduate Student on Grant	User	Grant
44	Key Researcher on Grant	User	Grant
82	Publication Translator	Publication	User
92	Publication Contributor	Publication	User

95	PhD Candidate on Grant	User	Grant
96	Postdoctoral Fellow on Grant	User	Grant
97	Key Personnel on Grant	User	Grant
117	Personnel on Grant	User	Grant
118	Project Lead on Grant	User	Grant
119	Co-project Leader on Grant	User	Grant
120	Principal Investigator on Grant	User	Grant
121	Co-principal Investigator on Grant	User	Grant
122	Co-investigator on Grant	User	Grant
125	Consultant on Grant	User	Grant
126	Collaborator on Grant	User	Grant
133	Clinical Evaluator on Grant	User	Grant
134	Research Assistant on Grant	User	Grant
135	Supervisor on Grant	User	Grant
136	Programme Co-ordinator on Grant	User	Grant
137	Programme Director on Grant	User	Grant
138	Researcher on Grant	User	Grant
139	Technician on Grant	User	Grant
141	Administrator on Grant	User	Grant
231	Primary Fund to Secondary Fund	Equipment *(Primary Fund)*	Equipment *(Secondary Fund)*
232	Secondary Fund to Tertiary Fund	Equipment *(Secondary Fund)*	Equipment *(Tertiary Fund)*
233	Grant (or contract) to Primary Fund	Grant	Equipment *(Primary Fund)*
234	Grant (or contract) to Secondary Fund	Grant	Equipment *(Secondary Fund)*
235	Grant (or contract) to Tertiary Fund	Grant	Equipment *(Tertiary Fund)*
236	Grant to Contract	Grant	Grant *(Contract)*
237	Contract to Contract	Grant *(Contract)*	Grant *(Contract)*
238	Payment to Appropriation	Grant *(Payment)*	Equipment *(Appropriation)*

Code Sets

Code sets are used to standardise the values of specific fields within the data model. Where a field references a code set, the value provided must be a valid code from the defined list, with the meaning of that value determined by reference to the code set rather than free-text description.

Currency Codes

The following is a list of currency codes available for NZRIS.

Currency	Code	Currency	Code
Australian Dollars	AUD	Brazilian Real	BRL
Canadian Dollars	CAD	Swiss Franc	CHF
Renminbi	CNY	Euro	EUR
Pound Sterling	GBP	Hong Kong Dollar	HKD
Indian Rupee	INR	Japanese Yen	JPY
South Korean Won	KRW	Mexican Peso	MXN
Norwegian Krone	NOK	New Zealand Dollar	NZD
Singapore Dollar	SGD	Swedish Krona	SEK
Turkish Lira	TRY	United States Dollar	USD
South African Rand	ZAR		

Language Codes

Language Codes (ISO 639-2) are internationally recognised three-letter codes used to identify languages in a standardised way. These codes support consistent language tagging across systems, enabling accurate data entry, multilingual support, and interoperability. For this documentation, an example list of 50 ISO 639-2 language codes has been selected to reflect some of the commonly used languages in New Zealand, including Pacific, Asian, and major European languages, as well as te reo Māori. Additional languages with NZRIS acceptable codes are available from the Library of Congress ([ISO 639-2 Language Code List - Codes for the representation of names of languages (Library of Congress)](#)).

Example List of Commonly Used Codes

Language	Code	Language	Code
Afrikaans	afr	Indonesian	ind
Amharic	amh	Italian	ita
Arabic	ara	Japanese	jpn
Armenian	arm	Korean	kor
Assamese	asm	Lao	lao
Azerbaijani	aze	Malagasy	mlg
Basque	baq	Malay	may
Bengali	ben	Māori	mao
Bulgarian	bul	Nepali	nep

Burmese	bur	Niuean	niu
Chechen	che	Persian	per
Chinese	chi	Polish	pol
Croatian	hrv	Portuguese	por
Czech	cze	Russian	rus
Danish	dan	Samoan	smo
Dutch	dut	Serbian	srp
Estonian	est	Somali	som
Fijian	fij	Swahili	swa
Finnish	fin	Tagalog	tgl
French	fre	Tamil	tam
Georgian	geo	Thai	tha
German	ger	Tongan	ton
Hebrew	heb	Turkish	tur
Hindi	hin	Vietnamese	vie

Label Schemes

Label Scheme tables are current as of 18 May 2026. For the latest Label Scheme information, please refer to the NZRIS GitHub repository. ([New Zealand Research Information System (NZRIS) · GitHub](#))

Label Schemes are used to classify records by applying one or more standardised labels that describe characteristics of the record as a whole. Unlike code sets, label schemes do not define the value of an individual field; instead, they provide structured categorisation that supports grouping, filtering, and analysis across records. Label schemes may allow multiple labels to be applied to a single record and, where relevant, may include weighting or percentage allocations to reflect relative emphasis (for example, research classifications applied to a grant).

There are several label schemes available in NZRIS allowing for categorisation of data. All labels are captured in a single field on the grants-metadata record. The format of the field is as follows:

- Label Value (e.g. 220302 Electronic information storage and retrieval services)
- pipe delimiter
- Label Scheme Identifier (e.g. for-2020)
- pipe delimiter
- Percentage (e.g. 25)
- semicolon delimiter = end of record.

<u>Example</u>: 310803 Plant cell and molecular biology|for-2020|25;310804 Plant developmental and reproductive biology|for-2020|50;310806 Plant physiology|for-2020|25;260205 Softwood plantations|seo-2020|30;260506 Kiwifruit|seo-2020|70

In the example above there are three Fields of Research 2020 codes:

310803 Plant cell and molecular biology (25%)
310804 Plant developmental and reproductive biology (50%)
310806 Plant physiology (25%)

and two Socio-Economic Objectives 2020 codes:

260205 Softwood plantations (30%)
260506 Kiwifruit (70%)

NZRIS allows multiple label schemes to be applied to a single record within the same label field. This enables data providers to describe a record using different classification perspectives at the same time. For example, a single grant or publication may be labelled using ANZSRC classifications, a Strategic Programme label, and one or more UN Sustainable Development Goals (SDGs), all within the same field. Each label retains its own scheme identifier and, where applicable, percentage weighting, allowing NZRIS to correctly interpret and group labels by scheme while maintaining a unified representation of the record.

<u>Example:</u> 310803 Plant cell and molecular biology|<u>for-2020</u>|25;CoRE Te Pūnaha Matatini|<u>c-strategic-programme</u>;2 Zero Hunger|<u>sdg</u>;

ANZSRC

ANZSRC code Label Values are constructed by combining the ANZSRC code and description. For example, as demonstrated below, the 2020 Fields of Research Code 440104 has a description of "Environmental anthropology". The Label Value required for NZRIS is therefore: 440104 Environmental anthropology.

This value is combined in the format above with delimiters "|" and the Label Scheme Identifier "for-2020".

Label Scheme Identifier	Description
for-2020	ANZSRC Fields of Research 2020
for	ANZSRC Fields of Research 2008
seo-2020	ANZSRC Socio-Economic Objectives 2020
c-socio-economic-objectives-2008	ANZSRC Socio-Economic Objectives 2008
toa-2020	ANZSRC Types of Activity 2020

ANZSRC Label Source and Known Issues

Data providers are strongly encouraged to use the ANZSRC label schemes published in the official NZRIS GitHub repository (New Zealand Research Information System (NZRIS) · GitHub) when constructing label values.

While ANZSRC codes and descriptions are originally defined by the Australian and New Zealand Statistical Standard, there are known differences between the published ANZSRC descriptions and the label values currently used within NZRIS. These differences include:

- For Field of Research 2008 codes - Instances where macrons in some Māori words are not present in the NZRIS label schemes,
- A small number of cases (nine descriptions) where the published ANZSRC description contains a semi-colon, which cannot be used directly due to ingestion constraints and must be replaced.

As the ANZSRC label schemes in NZRIS are implemented across shared Digital Science platforms, these discrepancies cannot currently be resolved directly within the system.

To ensure consistency and successful ingestion:

- Data providers should refer to the NZRIS GitHub repository as the authoritative source for all ANZSRC label values.

- Where ANZSRC descriptions contain semi-colons, the versions provided in the GitHub repository should be used, as these have been adjusted to ensure compatibility with NZRIS ingestion processes.

Using the GitHub repository ensures that submitted data aligns with the NZRIS implementation and avoids ingestion errors caused by mismatched or incompatible label values.

ANZSRC Descriptions with a Semi-colon

The following codes contain a semi-colon in the published description. For successful import the semi-colon is replaced with a double pipe character. Code descriptions are displayed correctly in NZRIS after import.

FOR 2020

- 510301 Acoustics and acoustical devices|| waves
- 510404 Electronic and magnetic properties of condensed matter|| superconductivity
- 510602 Plasma physics|| fusion plasmas|| electrical discharges

FOR 2008

- 020106 High Energy Astrophysics|| Cosmic Rays
- 020204 Plasma Physics|| Fusion Plasmas|| Electrical Discharges
- 020301 Acoustics and Acoustical Devices|| Waves
- 020404 Electronic and Magnetic Properties of Condensed Matter|| Superconductivity
- 029904 Synchrotrons|| Accelerators|| Instruments and Techniques
- 100605 Performance Evaluation|| Testing and Simulation of Reliability

Strategic Programme
(Label Scheme Identifier: c-strategic-programme)

Label Value	Description
CoRE Te Pūnaha Matatini	CoRE: Te Pūnaha Matatini - Complex Changes
CoRE Bio Protection Research Centre	CoRE: Bio Protection Research Centre
CoRE Brain Research New Zealand	CoRE: Brain Research New Zealand
CoRE: The Dodd Walls Centre	CoRE: The Dodd Walls Centre for Photonic and Quantum Technologies
CoRE The MacDiarmid Institute	CoRE: The MacDiarmid Institute for Advanced Materials and Nanotechnology
CoRE Maurice Wilkins Centre	CoRE: Maurice Wilkins Centre for Molecular Biodiscovery
CoRE Medical Technologies Centre of Research Excellence	CoRE: Medical Technologies Centre of Research Excellence
CoRE Ngā Pae o te Māramatanga	CoRE: Ngā Pae o te Māramatanga
CoRE QuakeCoRE	CoRE: QuakeCoRE
CoRE Riddet Institute	CoRE: Riddet Institute
NSC Better Start	A Better Start – E Tipu e Rea
NSC Aging Well	Ageing Well – Kia eke kairangi ki te taikaumātuatanga

NSC Building Better	Building Better Homes, Towns and Cities – Ko ngā wā kāinga hei whakamāhorahora
NSC Healthier Lives	Healthier Lives – He Oranga Hauora
NSC High-Value Nutrition	High-Value Nutrition – Ko Ngā Kai Whai Painga
NSC Biological Heritage	New Zealand's Biological Heritage – Ngā Koiora Tuku Iho
NSC Land and Water	Our Land and Water – Toitū te Whenua, Toiora te Wai
NSC Resilience	Resilience to Nature's Challenges – Kia manawaroa – Ngā Ākina o Te Ao Tūroa
NSC Technological Innovation	Science for Technological Innovation – Kia kotahi mai – Te Ao Pūtaiao me Te Ao Hangarau
NSC Sustainable Seas	Sustainable Seas – Ko ngā moana whakauka
NSC Deep South	The Deep South – Te Kōmata o Te Tonga

UN Sustainable Development Goals
(Label Scheme Identifier: sdg)

Label Value	Description
1 No Poverty	SDG 1 - No Poverty
2 Zero Hunger	SDG 2 - Zero Hunger
3 Good Health and Well Being	SDG 3 - Good Health and Well Being
4 Quality Education	SDG 4 - Quality Education
5 Gender Equality	SDG 5 - Gender Equality
6 Clean Water and Sanitation	SDG 6 - Clean Water and Sanitation
7 Affordable and Clean Energy	SDG 7 - Affordable and Clean Energy
8 Decent Work and Economic Growth	SDG 8 - Decent Work and Economic Growth
9 Industry, Innovation and Infrastructure	SDG 9 - Industry, Innovation and Infrastructure
10 Reduced Inequalities	SDG 10 - Reduced Inequalities
11 Sustainable Cities and Communities	SDG 11 - Sustainable Cities and Communities
12 Responsible Consumption and Production	SDG 12 - Responsible Consumption and Production
13 Climate Action	SDG 13 - Climate Action
14 Life Below Water	SDG 14 - Life Below Water
15 Life on Land	SDG 15 - Life on Land
16 Peace, Justice and Strong Institutions	SDG 16 - Peace, Justice and Strong Institutions
17 Partnerships for the Goals	SDG 17 - Partnerships for the Goals

Vision Mātauranga
(Label Scheme Identifier: c-vision-matauranga)

Label Value	Description
Hauora / Oranga	Improving Health and Social Wellbeing
Indigenous Innovation	Contributing to Economic Growth through Distinctive R&D
Mātauranga	Exploring indigenous knowledge and RS&T
Taiao	Achieving environmental sustainability through Iwi and Hāpu relationships with land and sea

Technology Readiness Level
(Label Scheme Identifier: c-technology-readiness-level)

Label Value	Description
Basic principles observed and reported	Scientific principles underlying the technology are identified and reported. No practical application yet; research is at the conceptual stage.
Technology concept and/or application formulated	The technology concept and potential application are formulated. Performance requirements are broadly defined but consistent with the concept.
Experimental proof of concept	Analytical and experimental critical function and/or characteristic proof-of-concept demonstrated in a laboratory environment.
Technology validated in laboratory	Component and/or breadboard validation in a laboratory environment. Demonstrates that the technology works under controlled conditions.
Technology validated in relevant environment	Component and/or breadboard critical function verification in a relevant environment (simulated operational conditions).
Technology demonstrated in relevant environment	Model or prototype demonstration of critical functions in a relevant environment.
System prototype demonstrated in operational environment	Model or prototype demonstration of the element performance in an operational environment.
System completed and qualified	System completed and "flight qualified" through test and demonstration in its operational environment.
Actual system proven in operational environment	System proven through successful mission operations.

Organisation Types

Organisation types define the primary nature or role of an organisation within the research and innovation system. Each organisation record can be assigned a single type selected from the following predefined list of permitted values.

Organisation types are descriptive rather than analytical. They identify what kind of organisation an entity is (for example, a university or Crown Research Institute), rather than categorising research activity or outcomes. Organisation types do not support multiple values or weighting and should reflect the organisation's primary form or function.

Type	Definition
G Government	A public-sector entity funded or controlled by central government or the equivalent level of government in another country. These organisations deliver public services, statutory functions, policy, planning, infrastructure, or regulation. While they may support or participate in research, research is not their primary purpose. Use this category only when no Government sub-type applies. If the organisation is a sub-national authority, select the "regional government" sub-type instead. Examples: central government ministries, non-research focused crown entities, government-owned or state-owned companies.
G01 Regional Government	A regional council or territorial authority listed in Schedule 2, Part 1 or Part 2 of the Local Government Act 2002, or an equivalent sub-national government authority in another country. Responsible for regional transport planning, environmental management, and natural resource governance. Examples: Environment Canterbury, Hawke's Bay Regional Council, Wellington City Council, Hamilton City Council, Southland District Council
E Education	An organisation whose primary purpose is the delivery of formal education or training. These entities may undertake research (particularly at tertiary level), but teaching remains their core role. Use this category only when no Education sub-type applies. If the organisation is a university, polytechnic, or wānanga, select that sub-type instead. Examples: Schools/kura; PTEs; education support agencies.
E01 University	A tertiary education institution authorised to award degrees and conduct teaching and research across multiple disciplines, under national or equivalent higher-education legislation or accreditation frameworks in the relevant country. Examples: University of Auckland, University of Otago, comparable degree-awarding universities in other jurisdictions.
E02 Polytechnic	A tertiary organisation focused on practical, technical, and vocational education with strong links to industry, including equivalent vocational or

Type	Definition
	technical higher-education institutions recognised under national education or training frameworks in other countries.
	Examples: Wintec, Ara Institute of Canterbury, or comparable technical, vocational, or applied higher-education institutions in other jurisdictions.
E03 Wānanga	A tertiary organisation delivering teaching and scholarship grounded in tikanga Māori and mātauranga Māori, recognised within the New Zealand tertiary education system as an Indigenous-led education provider.
	Examples: Te Wānanga o Aotearoa, Te Wānanga o Raukawa.
R Research	An organisation whose main purpose is scientific research, technological development, or knowledge creation. Research is its primary mission rather than a secondary activity. This includes organisations recognised as research-focused entities under national or equivalent frameworks in other countries. Use this category only when a more specific sub-type cannot be applied.
R01 Company	A commercial, profit-seeking organisation whose primary purpose is the conduct of scientific research, technological development, or knowledge creation, and which produces goods or services. This includes research-active companies operating under commercial and corporate frameworks in other countries. Organisations that may fall under this type include SMEs; start-ups; research-active technology or biotechnology companies.
	Examples: Dragonfly Data Science, Aqualinc Research Limited, Bodeker Scientific, Lincoln Agritech Ltd.
R02 Not-for-profit	A research organisation operating for a charitable, social, cultural, community, or environmental purpose without distributing profit. This includes not-for-profit research entities recognised under national or equivalent legal, charitable, or regulatory frameworks in other countries. Organisations that may fall under this type include independent research organisations; charitable trusts; NGOs; incorporated societies; iwi/hapū not-for-profit entities.
	Examples: Malaghan Institute of Medical Research, Cawthron Institute, Te Atawhai o Te Ao.
R03 Crown Research Institute	A government-owned research organisation established under the Crown Research Institutes Act 1992 to deliver scientific research for national benefit.
	Examples: NIWA, Scion, Plant & Food Research
R04 Public Research Organisation	A publicly funded research organisation formed through the 2025 merger and consolidation of New Zealand's seven CRIs into larger, multidisciplinary entities aligned with national research priorities.

Type	Definition
	Examples: Earth Sciences New Zealand, Bioeconomy Science Institute
N Non-research Organisation	An organisation whose primary purpose is not research, but which may carry out some research and development activity. This includes organisations operating under commercial, public-sector, or not-for-profit frameworks in New Zealand or other countries where research is incidental rather than a core function. Use this type when a more specific type cannot be applied.
N01 Company	A commercial, profit-seeking non-research organisation producing goods or services. This includes companies operating under commercial or corporate frameworks in New Zealand or other countries where research activity, if present, is not a primary purpose. Use this category only when no more specific company classification applies. Examples that may fall under this type include SMEs; large corporates; start-ups; state-owned enterprises (if classified as commercial).
	Examples: Resene Paints Ltd, Fisher and Paykel, Fertility Associates.
N02 Not-for-profit	A non-research organisation operating for a charitable, social, cultural, community, or environmental purpose without distributing profit. This includes not-for-profit entities operating under charitable or equivalent legal frameworks in New Zealand or other countries where research activity, if present, is not a primary purpose. Examples that may fall under this type include charitable trusts; NGOs; incorporated societies; iwi/hapū not-for-profit entities.
	Examples: Zealandia, Hokotehi Moriori Trust, Royal Society Te Apārangi, Cancer Society.
O Other	An organisation that does not fit any other category or sub-type after all applicable organisation types have been considered. Examples that may fall under this type include cooperatives; industry associations; unincorporated consortia.

Detailed Field Information

This section provides a structured overview of each field included in the data specification, supporting consistent data capture, ingestion, and interpretation. Each entry includes the field name, the category and ingest template it belongs to, and the specific types it applies to. A brief definition explains the field's purpose, while usage guidance offers context or instructions to ensure correct application.

Technical details are included to support implementation, such as the database column name, data type and length, formatting requirements (e.g. date formats), and any validation rules or code sets that apply. Fields are marked as mandatory or optional, and example values are provided to illustrate expected inputs. Where relevant, alternative field names used across different types are noted to help identify equivalent fields and maintain consistency.

This information is intended to help analysts, developers, and data stewards understand how each field should be used, validated, and interpreted across systems and datasets.

Field Name	**Abstract**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Artefact type Composition type Design type Exhibition type Internet Publication type Other type Patent type Performance type Poster type Report type Scholarly Edition Software / Code type Thesis / Dissertation type
Definition	A brief summary or abstract that provides context and key details about the output.
Guide for Use	This field should record the abstract of a publication or be a concise summary that describes the nature, purpose, and content of the output. It may include information about the topic, methodology, scope, or significance of the work. For creative outputs, describe the form, medium, and conceptual focus. The description should be written in plain language and be suitable for a general audience. Avoid technical jargon unless necessary. This information supports discoverability, classification, and understanding of the output across systems.
Column Name	abstract
Data Type	Text
Format & Length Layout	10,240 characters
Mandatory/Optional	Optional
Other Names	**Description (Publication)** (Book type) **Description (Publication)** (Chapter type) **Description (Publication)** (Conference type) **Description (Publication)** (Journal Article type) **Description (Publication)** (Dataset type) **Description (Publication)** (Figure type) **Description (Publication)** (Fileset type) **Description (Publication)** (Media type) **Description (Publication)** (Presentation type)

Field Name	**Access Type**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Chapter Conference Journal Article
Definition	The classification of a research output based on its availability to users, indicating whether it is openly accessible, restricted, or available through subscription or institutional access.
Guide for Use	This field should record the access status of the output at the time of data entry using standard terms such as "Open Access," "Embargoed," "Subscription," "Restricted," or "Internal Use Only." Use the terminology provided by the publisher, repository, or institution where applicable. If the access type is unclear or not specified, leave the field blank. This information is important for understanding how and by whom the research output can be accessed, and supports compliance with open-access policies, funding requirements, and institutional reporting.
Column Name	open-access-status
Data Type	choice
Mandatory/Optional	Optional
Example Values	Open Access, Internal Use Only

Field Name	**Acronyms**
Category & Ingest Template	External Organisation Category [Provider ID_Dataset #]_organisations.csv
Applicable Types	c-organisation
Definition	Any abbreviated names, initials, or commonly used short forms by which an organisation is known.
Guide for Use	This field should capture official acronyms, initialisms, or aliases that may be used in documentation, communications, or public references. Include all relevant abbreviations that help identify the organisation across systems and datasets. Use accurate and current acronyms, and separate multiple entries with a semicolon or other standard delimiter. This information is essential for improving searchability, supporting data matching, and ensuring consistency in organisational references.
Column Name	acronyms
Data Type	list
Format & Length Layout	Semi colon delimited
Mandatory/Optional	Optional
Example Values	NIWA; NZOI

Field Name	**Additional Aliases**
Category & Ingest Template	External Organisation Category [Provider ID_Dataset #]_organisations.csv
Applicable Types	c-organisation
Definition	Any other names, labels, or informal references by which an organisation may be known, aside from its official name or acronym.
Guide for Use	This field should capture alternative names that may appear in public discourse, legacy systems, historical records, or community usage. These could include former names, translations, nicknames, or descriptive titles that are not formal acronyms. Use clear and recognisable terms that help identify the organisation in different contexts. This information is useful for improving data linkage, supporting historical analysis, and ensuring comprehensive identification of organisations across datasets.
Column Name	aliases
Data Type	list
Format & Length Layout	Semi colon delimited
Mandatory/Optional	Optional
Example Values	Waipapa Taumata Rau; The University of Auckland; University of Auckland; Auckland University; Te Whare Wānanga o Tāmaki Makaurau

Field Name	**Address (Organisation)**
Category & Ingest Template	External Organisation Category [Provider ID_Dataset #]_organisations.csv
Applicable Types	c-organisation
Definition	The physical location associated with the organisation.
Guide for Use	The address field records the complete physical location of an organisation. An address includes the following components but not all of these are mandatory. Separate components with a comma. **Street Address:** Include building number and street name. Add apartment, suite, or unit numbers only if relevant. Do not include landmarks or directions. **City:** Enter the full city name without abbreviations. Use correct spelling and capitalisation. **State or Region:** Provide the official state, province, or region name, or use standard abbreviations (e.g. CA for California). Leave blank if not applicable. **Country:** Always include the full country name in English. This is essential because many cities share the same name across different countries (e.g. "Wellington" exists in New Zealand, Canada, and South Africa). Including the country ensures accurate identification, geolocation, and reporting. **Zip or Postal Code:** Use the official postal code format for the country. Do not add spaces or punctuation unless required by the format.
Column Name	addresses
Data Type	Address-list
Mandatory/Optional	Mandatory
Example Values	24 Princes Street,Auckland,New Zealand,2010

Field Name	**Address (Persons)**
Category & Ingest Template	Grant Category [Provider ID_Dataset #]_persons.csv [Provider ID_Dataset #]_collaborating-organisations.csv
Applicable Types	Grant
Definition	The physical location associated with a collaborating organisation.
Guide for Use	The address fields record the complete physical location of an organisation. They include the following components, each of which must be entered accurately: **Street Address:** Include building number and street name. Add apartment, suite, or unit numbers only if relevant. Do not include landmarks or directions. **City:** Enter the full city name without abbreviations. Use correct spelling and capitalisation. **State or Region:** Provide the official state, province, or region name, or use standard abbreviations (e.g. CA for California). Leave blank if not applicable. **Country:** Always include the full country name in English. This is essential because many cities share the same name across different countries (e.g. "Wellington" exists in New Zealand, Canada, and South Africa). Including the country ensures accurate identification, geolocation, and reporting. **Zip or Postal Code:** Use the official postal code format for the country. Do not add spaces or punctuation unless required by the format. Do not enter placeholder text such as "N/A" or "Unknown". Fields can be left blank if no data exists.
Column Name	c-collaborating-organisation
Mandatory/Optional	Optional
Example Values	Street Address: 24 Princes Street City: Auckland State or Region: Auckland Country: New Zealand Zip or Postal Code: 2010

Field Name	**Administering Organisation**
Category & Ingest Template	Equipment Category [Provider ID_Dataset #]_equipment.csv
Applicable Types	c-fund c-scholarship c-internship c-fellowship c-on-demand c-negotiated c-other
Definition	The organisation responsible for managing and delivering the fund <u>if not the funder</u>.
Guide for Use	This field should contain the name of the agency, department, or entity that oversees the administration of the fund, including tasks such as application processing, fund disbursement, monitoring, and reporting. Use the full name of the organisation and ensure it aligns with official records. This information is essential for accountability and for directing inquiries or correspondence related to the fund.
Column Name	c-administering-organisation
Data Type	Text
Format & Length Layout	255 characters
Mandatory/Optional	Optional
Example Values	Ministry for Business, Employment and Innovation

Field Name	**Affiliation GRID**
Category & Ingest Template	User Category [Provider ID_Dataset #]_users.csv
Definition	This field captures the user's affiliated organisation GRID ID (Global Research Identifier Database), a globally unique identifier used to distinguish research institutions and organisations. It supports consistent referencing of entities across datasets and systems, helping to link organisations to research activities, outputs, and funding.
Guide for Use	Enter the organisation's full GRID ID in the standard format (e.g. grid.1234.5). Ensure the GRID ID is valid and corresponds to the correct organisation as listed in the GRID database. Do not enter placeholder values, internal identifiers, or personal IDs. If the organisation does not have a GRID ID, leave the field blank.
Column Name	[Generic49]
Data Type	Text
Mandatory/Optional	Optional
Example Values	grid.1234.5

Field Name	**Affiliation NZBN**
Category & Ingest Template	User Category [Provider ID_Dataset #]_users.csv
Definition	This field captures the user's affiliated organisation New Zealand Business Number (NZBN). This is a globally unique 13-digit identifier assigned to New Zealand businesses and government agencies.
Guide for Use	This field should record the organisation's NZBN as issued by the NZBN Register, administered by the Companies Office. The NZBN links to core business information such as trading name, entity type, address, and contact details. Use the full 13-digit number and ensure it matches the official NZBN Register.
Column Name	[Generic50]
Data Type	Text
Format & Length Layout	24 characters
Mandatory/Optional	Optional
Example Values	9429041905239

Field Name	**Affiliation ROR**
Category & Ingest Template	User Category [Provider ID_Dataset #]_users.csv
Definition	This field captures the user's affiliated organisation ROR ID (Research Organisation Registry), a globally unique identifier used to represent research organisations in a standardised and interoperable way. It supports consistent referencing of institutions across systems and datasets, enabling improved linkage of organisations to research outputs, funding, and collaborations.
Guide for Use	Enter the organisation's full ROR ID in the standard format (e.g. https://ror.org/03yrm5c26). Ensure the ROR ID is valid and corresponds to the correct organisation as listed in the ROR registry. Do not enter placeholder values, internal identifiers, or personal IDs. If the organisation does not have a ROR ID, leave the field blank.
Column Name	[Generic48]
Data Type	Text
Mandatory/Optional	Optional
Example Values	https://ror.org/03yrm5c26

Field Name	**Allocation Method**
Category & Ingest Template	Equipment Category [Provider ID_Dataset #]_equipment.csv
Applicable Types	c-funding-round
Definition	The approach or process used to distribute funding to recipients.
Guide for Use	This field should specify how funding is allocated – whether through direct grants, competitive processes, formula-based distribution, or other mechanisms. It may also include criteria or decision-making processes used to determine allocations. Clear documentation of the allocation method supports transparency and consistency in funding decisions and enables effective evaluation and audit.
Column Name	c-allocation-method
Data Type	Fixed entry
Allowed Values	Contestable Negotiated On-demand Core-funding Targeted-Strategic Devolved
Mandatory/Optional	Optional
Example Values	Contestable

Field Name	**Alternative Description (Grant)**
Category & Ingest Template	Grant Category [Provider ID_Dataset #]_grants.csv
Applicable Type	Grant
Definition	An alternative description to that already provided in the description field – typically for use when the main description is not in English.
Guide for Use	Use this field to provide a translated or alternative version of the description when the original description is not in English. This supports accessibility and clarity for diverse audiences.
Column Name	c-alternative-description
Data Type	Text
Format & Length	10,240 characters
Mandatory/Optional	Optional

Field Name	**Alternative Description (Publication)**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Type	Chapter Conference Journal Article
Definition	An alternative description to that already provided in the description field – typically for use when the main description is not in English.
Guide for Use	Use this field to provide a translated or alternative version of the description when the original description is not in English. This supports accessibility and clarity for diverse audiences.
Column Name	c-alternative-description
Data Type	Text
Format & Length	10,240 characters
Mandatory/Optional	Optional

Field Name	**Alternative Name (Fund)**
Category & Ingest Template	Equipment Category [Provider ID_Dataset #]_equipment.csv
Applicable Types	c-fund c-scholarship c-fellowship c-internship c-on-demand c-negotiated c-other
Definition	Any other name(s) by which the fund or funding round is known, including acronyms, previous names, or informal titles.
Guide for Use	This field supports identification of the fund under different naming conventions. All relevant aliases should be included to support searchability and cross-referencing. If there are multiple alternative names, they should be separated clearly (e.g. using semicolons) to ensure readability.
Column Name	c-alternative-name
Data Type	Text
Format & Length Layout	255 characters
Mandatory/Optional	Optional
Example Values	c-fund: Endeavour c-funding-round: 2024 Smart Ideas

Field Name	**Alternative Name (Organisation)**
Category & Ingest Template	External Organisation Category [Provider ID_Dataset #]_organisations.csv
Applicable Types	c-organisation
Definition	An officially recognised name for the organisation that differs from its primary name, including names in other languages such as Te Reo Māori.
Guide for Use	This field should capture formal alternative names that are acknowledged by the organisation or its governing bodies. These may include names in Indigenous languages, bilingual naming conventions, or legally recognised translations. Use the full and correct spelling of the alternative name, and ensure it reflects current usage in official records, branding, or communications.
Column Name	c-alternative-name
Data Type	Text
Format & Length Layout	255 characters
Mandatory/Optional	Optional
Example Values	Hīkina Whakatutuki, Te Herenga Waka

Field Name	**Alternative Title (Grant)**
Category & Ingest Template	Grant Category [Provider ID_Dataset #]_grants.csv
Applicable Type	Grant
Definition	An alternative title to that already provided in the title field – typically for use when the main title is not in English.
Guide for Use	Use this field to provide a translated or alternative version of the main title, when the original title is not in English. This supports accessibility and clarity for diverse audiences.
Column Name	c-alternative-title
Data Type	Text
Format & Length Layout	10,240 characters
Mandatory/Optional	Optional

Field Name	**Alternative Title (Publication)**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Type	Chapter Conference Journal Article
Definition	An alternative title to that already provided in the title field – typically for use when the main title is not in English.
Guide for Use	Use this field to provide a translated or alternative version of the main title, when the original title is not in English. This supports accessibility and clarity for diverse audiences.
Column Name	c-alternative-title
Data Type	Text
Format & Length Layout	10,240 characters
Mandatory/Optional	Optional

Field Name	**Application Number**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Patent
Definition	A unique identifier assigned to a patent application by the relevant intellectual property office. Used to track and reference the application throughout the examination and publication process.
Guide for Use	This field should record the full application number exactly as it appears in the official documentation. Include any country or regional code, formatting, or prefixes provided by the issuing authority. Do not abbreviate or alter the number. This information is essential for identifying, citing, and verifying the legal and procedural status of a patent output.
Column Name	number
Data Type	Text
Mandatory/Optional	Optional
Example Values	US 16/123,456, PCT/AU2025/000123
Other Names	**Chapter Number** (Book type) **Chapter Number** (Chapter type) **Report** Number (Report type) **Article Number** (Journal Article type)

Field Name	**Application Reference**
Category & Ingest Template	Grant Category [Provider ID_Dataset #]_grants.csv
Applicable Type	Grant
Definition	Grant application number/reference.
Guide for Use	Enter the unique application or identification number assigned during the grant submission process. This helps track and link the grant to its original application record.
Column Name	c-funder-application-reference
Data Type	Text
Format & Length Layout	255 characters – multiple entries semi-colon delimited
Mandatory/Optional	Optional

Field Name	**Appropriation Description**
Category & Ingest Template	Equipment Category [Provider ID_Dataset #]_equipment.csv
Applicable Types	c-appropriation
Definition	A description of the appropriation from which the fund or funding round draws its financial resources.
Guide for Use	This field should explain the origin and nature of the appropriation, including the relevant legislation, budget line, or government initiative. It may also include the intended use of the funds as specified in the appropriation. The description should be informative enough to support financial tracking and accountability and should be written in a way that is understandable to both financial and non-financial users.
Column Name	description
Data Type	Text
Format & Length Layout	10,240 characters
Mandatory/Optional	Optional
Example Values	This appropriation is intended to support long-term research capability in areas of strategic importance to New Zealand. It funds research institutions and programmes that deliver public good science, build national capability, and contribute to economic, environmental, and social outcomes. The Strategic Science Investment Fund (SSIF) provides stable funding to support infrastructure, platforms, and research teams that are not easily funded through contestable mechanisms.
Other Names	**Funding Round Description** (c-funding-round) **Fund Description** (c-fund) **Fund Description** (c-scholarship) **Fund Description** (c-internship) **Fund Description** (c-fellowship) **Fund Description** (c-on-demand) **Fund Description** (c-negotiated) **Fund Description** (c-other)

Field Name	**Article Number**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Journal Article
Definition	A unique identifier assigned to an individual article within a journal or conference proceedings, often used in place of traditional page ranges, particularly in digital or open-access publications.
Guide for Use	This field should record the article number exactly as it appears in the publication. Use the publisher's wording without modification. If the publication uses page numbers instead of an article number, use the **Pagination** field. This information is important for accurate citation, indexing, and retrieval of articles, especially in formats where pagination is not used.
Column Name	number
Data Type	Text
Mandatory/Optional	Optional
Example Values	Article 10245, e01567
Other Names	**Chapter Number** (Book type) **Chapter Number** (Chapter type) **Report** Number (Report type) **Application Number** (Patent type)

Field Name	**Associated Authors**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_persons.csv
Applicable Types	Patent type
Definition	An individual who contributed to the intellectual development or technical content of a patent but is not formally listed as an inventor. Associated Authors may include collaborators, researchers, or technical experts whose work supported the creation of the patented invention, such as through background research, experimentation, or documentation.
Guide for Use	The surname and first-name fields should record the full names of individuals who played a substantive but non-inventive role in the development of the patent. These individuals are not legally recognised as inventors but may be acknowledged in related publications, reports, or internal records. Including Associated Authors helps provide a fuller picture of the research and development context surrounding the patent.
Column Name	associated-authors
Data Type	Person-list
Mandatory/Optional	Optional

Field Name	**Associated Grant Reference**
Category & Ingest Template	Grant Category [Provider ID_Dataset #]_grants.csv
Applicable Types	c-contract c-payment
Definition	A unique identifier or reference number for the grant associated with the contract record.
Guide for Use	The Associated Grant Reference field must be populated on a contract record when the contract is associated with, or related to, a specific grant or grants. This identifier ensures traceability between the contract and its funding source. The value entered should correspond to the unique grant reference number recorded in the grant record type. If the contract is not funded by a grant, this field should remain blank. Do not enter descriptive text or alternative identifiers; only the official grant reference number from the grant record should be used. This field is used for reporting, compliance, and audit purposes.
Column Name	c-associated-grant-reference
Data Type	Text
Format & Length Layout	255 characters – multiple entries can be semi-colon delimited
Mandatory/Optional	Optional
Example Values	UOOX2198;UOOX2199;UOOX2185

Field Name	**Authenticating Authority**
Category & Ingest Template	User Category [Provider ID_Dataset #]_users.csv
Definition	System-required value that identifies the authority responsible for authenticating the record. For all records, this is set to "Internal" to indicate that authentication is performed within the organisation's systems.
Guide for Use	Use this field to specify the authority responsible for authenticating the record. For all records, the value must be set to "Internal" to indicate that authentication is performed within the organisation's systems. Data providers must ensure this value is consistently applied to support auditability and maintain data integrity.
Column Name	authenticating authority
Data Type	Fixed entry
Allowed Values	Internal
Mandatory/Optional	Mandatory
Example Values	Internal

Field Name	**Authors**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_persons.csv
Applicable Types	All
Definition	To record individuals directly associated with the intellectual or creative content of the output (e.g. co-author) but only indirectly associated with a grant.
Guide for Use	The surname and first-name fields should record the full names of all authors in the order in which they appear on the output. Authors may include researchers, writers, creators, or contributors who played a substantive role in the development of the work but who are not direct recipients of a grant. Include all listed authors to ensure accurate attribution and enable proper citation and indexing across systems.
Column Name	authors
Data Type	Person-list
Additional Notes	For Directly Associated Individuals (e.g. for publications associated with a grant recipient) instead use the [Provider ID_Dataset #]_users.csv and [Provider ID_Dataset #]_links.csv files. See User section for more detail.
Mandatory/Optional	Mandatory

Field Name	**Award Date (Grant)**
Category & Ingest Template	Grant Category [Provider ID_Dataset #]_grants.csv
Applicable Type	Grant
Definition	The date the grant was officially awarded or confirmed.
Guide for Use	Use this field to record the official date the grant was awarded or confirmed. This date is important for tracking timelines, reporting, and compliance purposes.
Column Name	award-date
Data Type	date
Format & Length Layout	(yyyy-mm-dd)
Mandatory/Optional	Mandatory
Validation Rules	Must comply with the format yyyy-mm-dd.
Example Values	2025-04-25
Other Names	**Payment Date** (c-payment type)

Field Name	**Awarded Date (Publication)**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Type	Patent
Definition	The date on which the patent is officially granted by the relevant intellectual property authority. This marks the point at which the invention or process receives formal legal protection under patent law.
Guide for Use	Use this field to record the date the patent was awarded or granted. This is typically the date listed in the patent office's official documentation and may follow the filing and publication dates. Tracking the awarded date is important for managing intellectual property rights, determining the start of the enforceable protection period, and supporting reporting and commercialisation activities.
Column Name	start-date
Data Type	date
Format & Length Layout	(yyyy-mm-dd)
Mandatory/Optional	Optional
Validation Rules	Must comply with the format yyyy-mm-dd.
Example Values	2025-04-25
Other Names	**Start Date (Publication)** (Exhibition type) **Start Date (Publication)** (Performance type)

Field Name	**Book Title**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Chapter
Definition	The full title of the book in which a chapter or contribution is published, used to identify the parent work that contains the research output.
Guide for Use	This field should record the complete title of the book exactly as it appears in the publication. Do not abbreviate or modify the title. This information is essential for accurate citation, indexing, and understanding the relationship between the chapter and its broader published context.
Column Name	parent-title
Data Type	Text
Mandatory/Optional	Mandatory
Example Values	Handbook of Climate Change Adaptation, Advances in Artificial Intelligence
Other Values	**Preprint Server** (Preprint type) **Report Title** (Report type)

Field Name	**Category**
Category & Ingest Template	All Categories [Provider ID_Dataset #]_grants.csv [Provider ID_Dataset #]_equipment.csv [Provider ID_Dataset #]_publications.csv [Provider ID_Dataset #]_links.csv [Provider ID_Dataset #]_organisations.csv
Definition	A classification field that identifies the type of data entity being recorded, such as a fund, grant, publication, or user.
Guide for Use	This is a fixed entry field that determines how the data is characterised within the system and ensures that records are correctly sorted and displayed. The category should be selected from the predefined list below to maintain consistency and support reliable filtering, reporting, and data accuracy.
Column Name	category
Data Type	Text
Format & Length Layout	Fixed entry
Allowed Values / Code Set Reference/ Verification Rules	Grant Equipment External-Organisation Publication User
Mandatory/Optional	Mandatory
Example Values	Grant / Equipment / External-Organisation / Publication

Field Name	**Chapter Number**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Book Chapter
Definition	The numerical or sequential designation of a chapter within a book, used to identify its position in the overall structure of the publication.
Guide for Use	This field should record the chapter number exactly as stated in the publication (e.g. "Chapter 5," "Ch. 10"). Use the publisher's wording without modification. If the chapter is unnumbered or the book does not use numbered chapters, leave the field blank. This information is useful for citation, indexing, and understanding the organisation of the book in which the chapter appears.
Column Name	number
Data Type	Text
Mandatory/Optional	Optional
Example Values	Chapter 5
Other Names	**Article Number** (Journal Article type) **Report Number** (Report type) **Application Number** (Patent type)

Field Name	**Collaborating Organisation**
Category & Ingest Template	Grant Category [Provider ID_Dataset #]_collaborating-organisations.csv
Applicable Type	Grant c-contract
Definition	An organisation that contributes to the delivery, management, or outcomes of a grant-funded project, but is not the primary recipient of the grant. This may include partners involved in research, service delivery, or other project activities.
Guide for Use	Use this field to record the name of any organisation that is formally involved in the grant-funded project but is not the primary grant recipient. These organisations may contribute resources, expertise, or delivery support.
Column Name	c-collaborating-organisation
Data Type	Person-list
Mandatory/Optional	Optional

Field Name	**Conference Finish Date**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Type	Conference
Definition	The date on which the conference presentation or contribution is considered complete. This typically refers to the final day of the conference or the date the presentation was delivered, marking the conclusion of the activity associated with the output.
Guide for Use	Use this field to record the actual or scheduled date the conference presentation was delivered or the conference concluded. This helps track the timing of dissemination activities, align reporting with event schedules, and support evaluation of engagement and impact. For multi-day conferences, use the final day unless the presentation date is more relevant.
Column Name	finish-date
Data Type	Date
Format & Length Layout	(yyyy-mm-dd)
Mandatory/Optional	Optional
Validation Rules	Must comply with the format yyyy-mm-dd.
Example Values	2025-04-25
Other Names	**Finish Date** (Other type) **End Date (Publication)** (Exhibition type) **End Date (Publication)** (Performance type) **Expiry Date** (Patent type)

Field Name	**Conference Place**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Conference
Definition	The city or location where the conference was held, providing geographical context for the event at which the research output was presented or published.
Guide for Use	This field should record the full name of the city or location where the conference took place. Include additional geographic identifiers such as state or country if needed for clarity (e.g. "Cambridge, UK" vs. "Cambridge, MA"). Do not abbreviate or modify the place name. If the conference was held online or virtually, record as "Online" or "Virtual" as appropriate. This information is important for citation, indexing, and understanding the context and reach of the conference output.
Column Name	location
Data Type	Text
Mandatory/Optional	Optional
Example Values	Berlin, DE, Wellington, NZ, San Francisco, USA
Other Names	**Location** (Artefact type) **Location** (Other type) **Country** (Journal Article type) **Venue** (Exhibition type) **Place of Performance** (Performance type) **Presentation Location** (Presentation type) **Territory** (Patent type)

Field Name	**Conference Start Date**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Type	Conference
Definition	The date on which the conference officially begins. This marks the commencement of the event and the start of activities such as presentations, workshops, panels, and networking sessions.
Guide for Use	Use this field to record the first day of the conference. This is typically the date listed in the official event programme or promotional materials. For multi-day conferences, this should reflect the opening day of the event. This field is useful for tracking participation timelines, aligning outputs with event schedules, and supporting reporting on research dissemination and engagement. Ensure the date corresponds to the actual start of the event, not the date of registration or travel.
Column Name	start-date
Data Type	Date
Format & Length Layout	(yyyy-mm-dd)
Mandatory/Optional	Optional
Validation Rules	Must comply with the format yyyy-mm-dd.
Example Values	2025-04-25
Other Names	**Start Date (Publication)** (Exhibition type) **Start Date (Publication)** (Performance type) **Start Date (Publication)** (Other type) **Awarded Date (Publication)** (Patent type)

Field Name	**Constraints**
Category & Ingest Template	Grant Category [Provider ID_Dataset #]_grants.csv
Applicable Types	Grant c-contract c-devolved
Definition	Limitations, conditions, or requirements that affect how a grant can be used, managed, or delivered. Constraints may include funding restrictions, timeframes, regulatory obligations, or resource limitations that influence project scope or execution.
Guide for Use	Use this field to describe any conditions, limitations, or requirements that affect how the grant can be used or delivered. This may include restrictions on funding, timelines, eligible activities, or compliance obligations.
Column Name	c-constraints
Data Type	Text
Format & Length Layout	10,240 characters
Mandatory/Optional	Optional
Validation Rules	none

Field Name	**Contract Reference**
Category & Ingest Template	Grant Category [Provider ID_Dataset #]_grants.csv
Applicable Type	All types
Definition	A unique identifier or reference number assigned to the formal contract associated generally with the grant. This reference links the grant to its legally binding agreement outlining terms, conditions, and obligations.
Guide for Use	Use this field to record the official contract number or reference code issued by the funding body or administering organisation. This helps ensure traceability and supports compliance with contractual requirements.
Column Name	c-contract-reference
Data Type	Text
Format & Length Layout	255 characters – multiple entries semi-colon delimited
Mandatory/Optional	Mandatory for c-contract type Mandatory for c-payment type Mandatory for c-devolved type Optional for Grant type
Validation Rules	For c-contract type records value must match the ID

Field Name	**Country**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Journal Article
Definition	The country associated with the publisher or editorial office of the journal in which the article is published, providing geographic context for the source of publication.
Guide for Use	This field should record the name of the country where the journal's publisher or editorial office is based, as stated in the publication or official documentation. Use the full country name or the ISO 3166 country code. This field applies to journal article outputs and may support reporting, analysis, or classification based on geographic origin. If the country is not specified or cannot be determined, leave the field blank. This information helps contextualise the publication and may be relevant for institutional reporting, funding compliance, or bibliometric analysis.
Column Name	location
Data Type	Text
Mandatory/Optional	Optional
Example Values	United Kingdom, GB, United States, US, South Korea, KR
Other Names	**Location** (Artefact type) **Location** (Other type) **Conference Place** (Conference type) **Venue** (Exhibition type) **Place of Performance** (Performance type) **Presentation Location** (Presentation type) **Territory** (Patent type)

Field Name	**Currency Code**
Category & Ingest Template	Grant Category [Provider ID_Dataset #]_grants.csv
Definition	The currency that the grant, contract, or payment is being paid in.
Guide for Use	The Currency Code field represents the currency associated with a financial record. Enter a valid ISO 4217 currency code from the approved code set list, such as NZD for New Zealand Dollar, AUD for Australian Dollar, or USD for United States Dollar. Currency symbols (e.g., $, £), full currency names (e.g., "New Zealand Dollar"), or non-standard codes and abbreviations are not allowed. Only codes from the provided list are accepted, and the system will reject any value that does not comply with these requirements.
Data Type	Fixed entry
Format & Length Layout	Fixed list
Code Set Reference	See **Code sets** are used to standardise the values of specific fields within the data model. Where a field references a code set, the value provided must be a valid code from the defined list, with the meaning of that value determined by reference to the code set rather than free-text description. Currency Codes
Mandatory/Optional	Mandatory
Validation Rules	From approved list
Example Values	NZD, AUD, GBP

Field Name	**Date Awarded**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Type	Thesis/Dissertation
Definition	The date on which the thesis or dissertation was formally accepted and the degree conferred by the awarding institution. This marks the official recognition of the candidate's academic achievement.
Guide for Use	Use this field to record the date the degree associated with the thesis or dissertation was officially awarded. This is typically the conferral date listed on the academic transcript or graduation documentation. It may differ from the submission or examination date and is used to track completion milestones, support reporting, and verify qualification timelines.
Column Name	publication-date
Data Type	Date
Format & Length Layout	(yyyy-mm-dd)
Mandatory/Optional	Mandatory for Poster type Optional for Presentation type
Validation Rules	Must comply with the format yyyy-mm-dd.
Example Values	2025-04-25
Other Names	**Production Date** (Book type) **Production Date** (Chapter type) **Production Date** (Conference type) **Production Date** (Journal Article type) **Publication Date** (Artefact type) **Publication Date** (Composition type) **Publication Date** (Design type) **Publication Date** (Preprint type) **Publication Date** (Dataset type) **Publication Date** (Patent type) **Publication Date** (Software / Code type) **Publication Date** (Internet Publication type) **Publication Date** (Report type) **Publication Date** (Scholarly Edition type) **Publication Date** (Other type) **Presentation Date** (Presentation type) **Presentation Date** (Poster type)

Field Name	**Date Submitted**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Type	Thesis/Dissertation
Definition	The date on which the thesis or dissertation is formally submitted to the awarding institution for examination or review. This marks the completion of the candidate's research and the transition to the assessment phase.
Guide for Use	Use this field to record the official date the thesis or dissertation was submitted. This is typically the date acknowledged by the institution or graduate school and is used to track academic progress, align with graduation timelines, and support reporting on research outputs. Ensure the date reflects formal submission rather than internal drafts or supervisor reviews.
Column Name	filed-date
Data Type	Date
Format & Length Layout	(yyyy-mm-dd)
Mandatory/Optional	Optional
Validation Rules	Must comply with the format yyyy-mm-dd.
Example Values	2025-04-25
Other Names	**Filed Date** (Patent type)

Field Name	**Description (Grant)**
Category & Ingest Template	Grant Category [Provider ID_Dataset #]_grants.csv
Applicable Type	All types – names may differ depending on type
Definition	A brief summary, abstract, or public statement outlining the purpose, scope, or key details of the grant or grant contract. It provides context for understanding the nature and intent of the funded activity.
Guide for Use	Use this field to provide a clear and concise overview of the grant or contract, including its objectives, focus areas, or intended outcomes. Avoid duplicating information from other fields unless necessary for clarity.
Column Name	description
Data Type	Text
Format & Length Layout	10,240 characters
Mandatory/Optional	Mandatory
Other Names	**Description (Grant)** (Grant type) **Summary** (c-contract type) **Details** (c-payment type) **Summary** (c-devolved type)

Field Name	**Description (Publication)**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Book type Chapter type Conference type Journal Article type Dataset type Figure type Fileset type Media type Presentation type
Definition	A brief summary or abstract that provides context and key details about the output.
Guide for Use	This field should record the abstract of a publication or be a concise summary that describes the nature, purpose, and content of the output. It may include information about the topic, methodology, scope, or significance of the work. For creative outputs, describe the form, medium, and conceptual focus. The description should be written in plain language and be suitable for a general audience. Avoid technical jargon unless necessary. This information supports discoverability, classification, and understanding of the output across systems.
Column Name	abstract
Data Type	Text
Format & Length Layout	10,240 characters
Mandatory/Optional	Optional
Other Names	**Abstract** (Artefact type) **Abstract** (Composition type) **Abstract** (Design type) **Abstract** (Exhibition type) **Abstract** (Internet Publication type) **Abstract** (Other type) **Abstract** (Patent type) **Abstract** (Performance type) **Abstract** (Poster type) **Abstract** (Report type) **Abstract** (Scholarly Edition) **Abstract** (Software type) **Abstract** (Thesis / Dissertation type)

Field Name	**Description Language**
Category & Ingest Template	Grant Category [Provider ID_Dataset #]_grants.csv
Applicable Type	Grant
Definition	The language in which the grant or contract description is written if not English.
Guide for Use	Use this field to indicate the language of the description text using ISO 639-2 codes. This supports accessibility, translation, and multilingual reporting.
Column Name	c-description-language
Data Type	Text
Format & Length Layout	3 characters
Code Set Reference	See **Language Codes**
Mandatory/Optional	Optional
Example Values	mao, cri

Field Name	**Details**
Category & Ingest Template	Grant Category [Provider ID_Dataset #]_grants.csv
Applicable Type	c-payment type
Definition	A brief summary outlining the purpose, scope, or key details of the payment.
Guide for Use	Use this field to provide a clear and concise overview of the payment. Avoid duplicating information from other fields unless necessary for clarity.
Column Name	description
Data Type	Text
Format & Length Layout	10,240 characters
Mandatory/Optional	Mandatory
Other Names	**Description (Grant)** (Grant type) **Summary** (c-contract type) **Summary** (c-devolved type)
Example Values	2023 payment for contract xx12345

Field Name	**Disestablishment Date (Fund)**
Category & Ingest Template	Equipment Category [Provider ID_Dataset #]_equipment.csv
Applicable Types	c-fund c-scholarship c-internship c-fellowship c-on-demand c-negotiated c-other
Definition	The date on which the fund or funding round was formally closed, discontinued, or became inactive.
Guide for Use	This field indicates the date the fund or funding round was formally closed, discontinued, or became inactive. If the fund is still active, this field should be left blank. Including this information helps distinguish between active and inactive funds for reporting and analysis purposes.
Column Name	finish-date
Data Type	Date
Format & Length Layout	(yyyy-mm-dd)
Mandatory/Optional	Optional
Validation Rules	Must comply with the format yyyy-mm-dd.
Example Values	2025-04-25
Other Names	**End Year** (c-appropriation)

Field Name	**Disestablishment Date (Organisation)**
Category & Ingest Template	External Organisation Category [Provider ID_Dataset #]_organisations.csv
Applicable Types	c-organisation
Definition	The date on which the organisation formally ceased operations or was legally dissolved.
Guide for Use	This field should record the official date the organisation was disbanded, merged, restructured, or otherwise ceased to exist in its original form. This information is important for historical tracking and data integrity. If the exact date is unknown, use the most accurate approximation available.
Column Name	c-disestablished-date
Data Type	Date
Format & Length Layout	(yyyy-mm-dd)
Mandatory/Optional	Optional
Validation Rules	Must comply with yyyy-mm-dd format.
Example Values	2025-04-25

Field Name	**Distributing Organisation**
Category & Ingest Template	Grant Category [Provider ID_Dataset #]_grants.csv
Applicable Type	c-contract c-payment c-devolved
Definition	The name of the organisation or entity providing the grant funding or responsible for the distribution of monies.
Guide for Use	Use this field to record the full name of the recipient organisation. This supports reporting, analysis, and identification of funding sources across grant records. The identifier for the organisation should also be included. This field should contain the name and identifiers of an entity as a single string, with components separated by pipe, colon, and semi-colon (| : ;) characters. The components must appear in the following order: Organisation Name | scheme : identifier ; scheme : identifier ; scheme : identifier **Organisation Name**: Include the full name of the organisation. **Scheme:** Provide the fixed-entry identifier type • ror-id • grid-id • nzbn **Identifier:** Use the official research organisation or business identifier, to uniquely identify the entity. A single organisation identifier is sufficient however multiple identifiers can be provided using a semi-colon. If a grant has multiple recipient organisations, a separate grant record should be submitted for each organisation, with the total grant value proportionally split across those records.
Column Name	funder
Data Type	Text
Format & Length Layout	Organisation Name | scheme : identifier ; Use pipe and colon delimiters (" | " " : " " ; ")
Mandatory/Optional	Mandatory
Example Values	University of Otago|ror-id:https://ror.org/01jmxt844;grid-id:grid.xyzgridID;nzbn:987654321099
Other Names	**Funder Name** (Grant type)

Field Name	**DOI**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Type	Book Other Chapter Media Conference Presentation Journal Article Preprint Report Dataset Scholarly Edition Patent Fileset Software/Code Figure Internet Publication
Definition	A Digital Object Identifier (DOI) is a unique alphanumeric string assigned to a research output – such as a journal article, dataset, or report – that provides a persistent and reliable link to its location on the internet.
Guide for Use	Use this field to record the DOI associated with the research output. This helps ensure accurate identification, citation, and long-term access. The DOI should be entered in a standard format as a DOI string. Avoid including spaces, punctuation, or non-DOI links.
Column Name	doi
Data Type	doi
Format & Length Layout	Must be a valid DOI e.g. 10.1000/182
Mandatory/Optional	Optional
Validation Rules	none
Example Values	10.1000/182

Field Name	**Edition**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Book Chapter Journal Article Other
Definition	The version or iteration of a published work, indicating updates, revisions, or re-releases.
Guide for Use	This field should record the edition number or description as stated in the publication (e.g. "2nd edition," "Revised edition"). Use the exact wording provided by the publisher. If no edition is specified, leave the field blank. This information is important for distinguishing between different versions of the same work, particularly when citing or referencing publications.
Column Name	edition
Data Type	Text
Mandatory/Optional	Optional

Field Name	**Editors**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_persons.csv
Applicable Types	Book Chapter Conference Journal Article Other
Definition	The individuals responsible for compiling, curating, or overseeing the content of the output, particularly in edited volumes or collections but only indirectly associated with a grant.
Guide for Use	This field should record the full names of all editors as they appear in the source material. Editors are typically responsible for selecting, organising, and reviewing content, and may also contribute introductory or contextual material. Use the format "First-Name Last-Name" and separate multiple editors with a semicolon. This field is especially relevant for edited books, special journal issues, or curated exhibitions.
Column Name	editors
Data Type	Person-list
Format & Length Layout	For Directly Associated Individuals (e.g. for publications associated with a grant recipient) instead use the [Provider ID_Dataset #]_users.csv and [Provider ID_Dataset #]_links.csv files. See User section for more detail.
Mandatory/Optional	Optional
Other Names	**Supervisors** (Thesis / Dissertation type)

Field Name	**eISSN**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Type	Internet Publication
Definition	An eISSN (Electronic International Standard Serial Number) is an 8-digit identifier assigned to the digital version of a serial publication, such as an online journal or magazine. It uniquely identifies the electronic format of the title and is used for cataloguing, citation, and digital access.
Guide for Use	Use this field to record the eISSN associated with the electronic version of the serial publication in which the research output appears. The eISSN should be entered as an 8-digit number, typically formatted with a hyphen separating the two four-digit segments (e.g. 2049-3630). Ensure the number is accurate and corresponds specifically to the digital version of the title. Do not include prefixes such as "eISSN" or any additional text. If both print and electronic ISSNs exist, record each in their respective fields.
Column Name	eissn
Data Type	eissn
Format & Length Layout	Eight digits separated with a hyphen - ####-####
Mandatory/Optional	Optional

Field Name	**Email**
Category & Ingest Template	User category [Provider ID_Dataset #]_users.csv
Definition	A generic email address for NZRIS system purposes only.
Guide for Use	Use this field to record the email address linked to the user. An email address is a mandatory requirement of the underlying system and must be supplied for each record but is not used by NZRIS. To support consistency and reduce maintenance overhead, data providers are strongly encouraged to supply a **generic email address** to meet system requirements (e.g. name@domain.com) rather than a personal or individual email. This ensures continuity in communication and access even if personnel change.
Column Name	email
Data Type	email
Format & Length Layout	Email addresses must follow the standard format local-part@domain, containing exactly one @ symbol and a valid domain with at least one period (e.g. govt.nz.org). The field should not include spaces or invalid characters and must be limited to 254 characters. All entries should be in lowercase.
Mandatory/Optional	Mandatory
Example Values	generic-email@nzris.govt.nz

Field Name	**End Date (Grant)**
Category & Ingest Template	Grant Category [Provider ID_Dataset #]_grants.csv
Applicable Type	All
Definition	The date on which the grant-funded activity or contract is scheduled to conclude.
Guide for Use	Use this field to record the planned or actual end date of the grant. This is used to track project duration, determine eligibility periods, and manage reporting timelines.
Column Name	end-date
Data Type	Date
Format & Length Layout	(yyyy-mm-dd)
Mandatory/Optional	Mandatory c-contract type Mandatory c-devolved type Optional Grant type Optional c-payment type
Validation Rules	Must comply with the format yyyy-mm-dd.
Example Values	2025-04-25

Field Name	**End Date (Publication)**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Type	Exhibition Performance
Definition	The date on which the exhibition or performance activity concludes. For exhibitions, this refers to the final day the work is publicly displayed; for performances, it refers to the last scheduled presentation or showing of the work.
Guide for Use	Use this field to record the actual or scheduled end date of the exhibition or performance. This supports tracking of public engagement periods, alignment with reporting timelines, and evaluation of reach and impact. For **exhibitions**, use the closing date of the display period. If the exhibition is touring or shown at multiple venues, use the final date of the last showing unless otherwise specified. For **performances**, use the date of the final presentation. If there are multiple showings, select the last scheduled performance unless a specific date is more relevant for reporting purposes.
Column Name	finish-date
Data Type	Date
Format & Length Layout	(yyyy-mm-dd)
Mandatory/Optional	Optional
Validation Rules	Must comply with the format yyyy-mm-dd.
Example Values	2025-04-25
Other Names	**Finish Date** (Other type) **Conference Finish Date** (Conference type) **Expiry Date** (Patent type)

Field Name	**End Year**
Category & Ingest Template	Equipment Category [Provider ID_Dataset #]_equipment.csv
Applicable Types	c-appropriation
Definition	The calendar year in which the appropriation concludes or ceases to provide funding.
Guide for Use	Use this field to specify the year (in "yyyy" format) when the appropriation ends. This helps define the duration of the funding arrangement and supports lifecycle management, financial accountability, and reporting. If the appropriation is ongoing or indefinite, leave blank.
Column Name	finish-date
Data Type	Date
Format & Length Layout	(yyyy)
Mandatory/Optional	Optional
Validation Rules	Must comply with the format yyyy.
Example Values	2025
Other Names	**Disestablishment Date (Fund)** (c-fund) **Disestablishment Date (Fund)** (c-scholarship) **Disestablishment Date (Fund)** (c-internship) **Disestablishment Date (Fund)** (c-fellowship) **Disestablishment Date (Fund)** (c-on-demand) **Disestablishment Date (Fund)** (c-negotiated) **Disestablishment Date (Fund)** (c-other)

Field Name	**Establishment Date (Fund)**
Category & Ingest Template	Equipment Category [Provider ID_Dataset #]_equipment.csv
Applicable Types	c-fund c-scholarship c-internship c-fellowship c-on-demand c-negotiated c-other
Definition	The date on which the fund or funding round was formally established or launched.
Guide for Use	This field records the date the fund or funding round was formally established or launched. If the exact date is not known, the best available approximation may be used, with any uncertainty noted where relevant. This field is useful for tracking the fund's lifecycle and historical context.
Column Name	start-date
Data Type	Date
Format & Length Layout	(yyyy-mm-dd)
Mandatory/Optional	Optional
Validation Rules	Must comply with the format yyyy-mm-dd.
Example Values	2025-04-25
Other Names	**Start Year** (c-appropriation)

Field Name	**Establishment Date (Organisation)**
Category & Ingest Template	External Organisation Category [Provider ID_Dataset #]_organisations.csv
Applicable Types	c-organisation
Definition	The date on which the organisation was formally founded or established for organisations established after 2015.
Guide for Use	This field should record the official date the organisation began operations or was legally constituted if this occurred after 2015. This information is important for historical context particularly following organisational restructure or reform (e.g. the creation of the Public Research Organisations in 2025). If the exact date is unknown, use the most precise approximation.
Column Name	established
Data Type	Date
Format & Length Layout	(yyyy-mm-dd)
Mandatory/Optional	Optional
Validation Rules	Must comply with yyyy-mm-dd format.
Example Values	2025-04-25

Field Name	**Expiry Date**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Type	Patent
Definition	The date on which the legal protection granted by the patent ends. After this date, the patented invention or process is no longer protected under patent law and may be freely used by others without infringement.
Guide for Use	Use this field to record the official expiry date of the patent, as determined by the relevant intellectual property authority. This is typically calculated based on the filing date and the jurisdiction's standard patent term (e.g. 20 years from filing). Tracking expiry dates is important for managing intellectual property portfolios, assessing commercialisation timelines, and identifying opportunities for renewal or public domain use.
Column Name	finish-date
Data Type	Date
Format & Length Layout	(yyyy-mm-dd)
Mandatory/Optional	Optional
Validation Rules	Must comply with the format yyyy-mm-dd.
Example Values	2025-04-25
Other Names	**Finish Date** (Other type) **Conference Finish Date** (Conference type) **End Date (Publication)** (Exhibition type) **End Date (Publication)** (Performance type)

Field Name	**Filed Date**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Type	Patent
Definition	The date on which the patent application was officially submitted to the relevant intellectual property authority. This marks the beginning of the patent process and establishes the priority date for the invention.
Guide for Use	Use this field to record the date the patent application was filed. This is a critical milestone in the lifecycle of a patent, used to determine the duration of protection, assess novelty, and establish precedence in case of competing claims. Ensure the date matches the official records from the patent office or intellectual property database.
Column Name	filed-date
Data Type	Date
Format & Length Layout	(yyyy-mm-dd)
Mandatory/Optional	Optional
Validation Rules	Must comply with the format yyyy-mm-dd.
Example Values	2025-04-25
Other Names	**Date Submitted** (Thesis/Dissertation type)

Field Name	**Finish Date**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Type	Other
Definition	The date on which the creation or development of the publication output is considered complete. This marks the point at which the output is finalised, submitted, published, or otherwise made publicly accessible, depending on the nature of the output.
Guide for Use	Use this field to record the actual or planned completion date of the publication output. This may refer to the date the item was uploaded, released, or shared with stakeholders. This date helps track output timelines, assess delivery against milestones, and support reporting and evaluation processes.
Column Name	finish-date
Data Type	Date
Format & Length Layout	(yyyy-mm-dd)
Mandatory/Optional	Optional
Validation Rules	Must comply with the format yyyy-mm-dd.
Example Values	2025-04-25
Other Names	**Conference Finish Date** (Conference type) **End Date (Publication)** (Exhibition type) **End Date (Publication)** (Performance type) **Expiry Date** (Patent type)

Field Name	**First Name**
Category & Ingest Template	User Category [Provider ID_Dataset #]_users.csv
Definition	The given name of the user. This is typically the name the individual is commonly known by and may include multiple names if culturally appropriate.
Guide for Use	Enter the user's first (given) name exactly as it is provided by the individual. This may include multiple given names if applicable (e.g. "Mary Jane"). Do not include titles such as Mr, Ms, or Dr, nor suffixes like Jr or Sr. Middle names should be excluded unless they are part of the individual's given name. Ensure the name is properly capitalised (e.g. "John" rather than "john" or "JOHN"). Avoid using nicknames. If the first name is unknown, leave the field blank or if the person has an alternative name they prefer to be known by, use the **Known As** field.
Column Name	firstname
Data Type	Text
Mandatory/Optional	Optional
Example Values	Angela, Chris

Field Name	**Fund Description**
Category & Ingest Template	Equipment Category [Provider ID_Dataset #]_equipment.csv
Applicable Types	c-fund c-on-demand c-scholarship c-negotiated c-internship c-other c-fellowship
Definition	A brief summary outlining the purpose, scope, and key characteristics of the fund which is visible on the NZRIS website.
Guide for Use	This field provides a concise summary of the fund's purpose and scope. It should describe the fund's investment focus, target sectors, geographic coverage, and funding mechanisms. The description should be brief and written in plain language to ensure it is easily understood by a broad audience.
Column Name	description
Data Type	Text
Format & Length Layout	10,240 characters
Mandatory/Optional	Optional
Example Values	The Marsden Fund encourages New Zealand's leading researchers to explore new ideas that may not be funded through other funding streams and fosters creativity and innovation within the science, innovation and technology system. Exploring new ideas results in greater potential to develop new technologies and products, boost economic growth, and enhance New Zealand's quality of life. The Marsden Fund invests in excellent, investigator-led research aimed at generating new knowledge, with the potential for long-term economic, environmental or health benefit to New Zealand. It supports excellent research projects that advance and expand the knowledge base and contributes to the development of people with advanced skills in New Zealand.
Other Names	**Funding Round Description** (c-funding-round) **Appropriation Description** (c-appropriation)

Field Name	**Funder Name**
Category & Ingest Template	Grant Category [Provider ID_Dataset #]_grants.csv
Applicable Type	Grant
Definition	The name of the organisation or entity providing the grant funding or responsible for the distribution of monies.

Guide for Use	Use this field to record the full name of the recipient organisation. This supports reporting, analysis, and identification of funding sources across grant records. The identifier for the organisation should also be included.
	
	This field should contain the name and identifiers of an entity as a single string, with components separated by pipe, colon, and semi-colon (| : ;) characters. The components must appear in the following order:
	
	Organisation Name | scheme : identifier ; scheme : identifier ; scheme : identifier
	
	Organisation Name: Include the full name of the organisation.
	
	Scheme: Provide the fixed-entry identifier type
	
	    • ror-id
	    • grid-id
	    • nzbn
	
	Identifier: Use the official research organisation or business identifier, to uniquely identify the entity.
	
	A single organisation identifier is sufficient however multiple identifiers can be provided using a semi-colon.
	
	If a grant has multiple recipient organisations, a separate grant record should be submitted for each organisation, with the total grant value proportionally split across those records.

Column Name	funder
Data Type	Text
Format & Length Layout	Organisation Name | scheme : identifier ; Use pipe and colon delimiters (" | " " : " " ; ")
Mandatory/Optional	Mandatory
Example Values	University of Otago|ror-id:https://ror.org/01jmxt844;grid-id:grid.xyzgridID;nzbn:987654321099
Other Names	**Distributing Organisation** (c-contract, c-payment, c-devolved types)

Field Name	**Funding Round Description**
Category & Ingest Template	Equipment Category [Provider ID_Dataset #]_equipment.csv
Applicable Types	c-funding-round
Definition	A non-mandatory informational summary that outlines the purpose, scope, and key features of a specific funding round if appropriate to the funder.
Guide for Use	This field should describe the intent and structure of the funding round, including its objectives, target recipients, funding limits, and any thematic or strategic focus. The description should be clear and concise and written in plain language to ensure accessibility. It helps users understand the context and purpose of the round without needing to refer to external documentation and will be published to the NZRIS website.
Column Name	description
Data Type	Text
Format & Length Layout	10,240 characters
Mandatory/Optional	Optional
Example Values	The objectives of the Marsden Fund are to: A) enhance the quality of research in New Zealand by creating increased opportunity to undertake excellent investigator-led research. B) contribute in the long-term to economic, environmental or health impacts for New Zealand. C) support the advancement of knowledge and technology in New Zealand and contribute to the global knowledge base. D) contribute to the development of advanced skills in New Zealand, including support for continuing training of post-doctoral level researchers and support for the establishment of early careers of new and emerging researchers. E) support research where there is a clear rationale for the research to be undertaken in New Zealand.
Other Names	**Appropriation Description** (c-appropriation) **Fund Description** (c-fund) **Fund Description** (c-scholarship) **Fund Description** (c-internship) **Fund Description** (c-fellowship) **Fund Description** (c-on-demand) **Fund Description** (c-negotiated) **Fund Description** (c-other)

Field Name	**Funding Source**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Definition	The source of financial support that contributed to the production of a research output. This includes the grant or funding identifier and the organisation responsible for providing or administering the funds.
Guide for Use	This field should record the specific grant number followed by the organisation or grant name (e.g. C0#X1654 : Endeavour Fund - Smart Ideas). If there are multiple contributing sources delimit each with a semi colon. Providing accurate and consistent details ensures transparency and proper attribution, and helps users identify the origin of funding without referring to external documentation.
Column Name	c-funding-source-reference
Data Type	Text
Mandatory/Optional	Optional
Example Values	C0#X1654 : Endeavour Fund - Smart Ideas

Field Name	**Grant Reference**
Category & Ingest Template	Grant Category [Provider ID_Dataset #]_grants.csv
Applicable Types	Grant
Definition	A unique identifier or reference number assigned to the grant.
Guide for Use	The Grant Reference field must contain the official reference number or identifier assigned to the grant by the funding body or issuing authority. The supplied value should be the same as the record ID for the grant record, but it is stored separately to make sure the identifier remains consistent even if the system changes the record ID in the future. The grant reference should be entered exactly as provided by the funding source, without alteration, abbreviations, or additional characters. This field is mandatory for all grant records and is used for compliance, audit, and integration with external systems.
Column Name	funder-field
Data Type	Text
Format & Length Layout	10,240 characters
Mandatory/Optional	Mandatory
Validation Rules	For Grant type records the ID field must match the Grant Reference.
Example Values	UOOX2198

Field Name	**ID**
Category & Ingest Template	All Categories All ingest templates
Applicable Types	All
Definition	A unique identifier assigned to each individual record, used to distinguish grants and other funding entities from one another.
Guide for Use	This is a mandatory field and must contain a value that is unique across all records. The ID serves as the primary reference point for each grant or funding entry, enabling accurate tracking, linking, and retrieval of data. It is essential for ensuring data integrity and preventing duplication. The ID may be system-generated or manually assigned, but it must remain stable over time and not be reused. Correct use of this field supports reliable internal processing and ensures that records are correctly referenced in outputs, including those published to the website.
Column Name	[category]id
Data Type	Text
Format & Length Layout	10,240 characters
Mandatory/Optional	Mandatory
Validation Rules	No leading spaces
Other Names	**Proprietary_ID**

Field Name	**Identifiers**
Category & Ingest Template	External Organisation Category [Provider ID_Dataset #]_organisations.csv [Provider ID_Dataset #]_collaborating-organisations.csv
Applicable Types	c-organisation
Definition	A structured list of identifiers that link the organisation to one or more parent entities that oversee, own, or govern it.

Guide for Use	This field should record persistent identifiers (e.g. NZBN, ROR, GRID) associated with the entity. Each entry should include the chosen scheme and identifier/s for the organisation. Use accurate and current identifiers that reflect formal relationships such as ministerial oversight, institutional affiliation, or corporate ownership. This information is essential for understanding organisational hierarchy, enabling data integration, and supporting reporting and governance structures. If multiple identifiers exist, record each one clearly and consistently using the identifier-list format.
	
	This field should contain the identifier/s of an entity as a single string, with components separated by colon and semicolon (: ;) characters. The components must appear in the following order:
	
	scheme : identifier ; scheme : identifier ; scheme : identifier
	
	Scheme: Provide the fixed-entry identifier type:
	
	    • ror-id
	    • grid-id
	    • nzbn
	
	Identifier: Use the official research organisation or business identifier, to uniquely identify the entity.

Column Name	identifiers
Data Type	Identifier-list
Mandatory/Optional	Optional
Example Values	ror-id:https://ror.org/01jmxt844; grid-id:grid.xyzgridID;nzbn:987654321099

Field Name	**Initials**
Category & Ingest Template	User Category [Provider ID_Dataset #]_users.csv
Definition	This field captures any initials included as part of an individual's full name, typically representing middle names or additional given names. It is used to help distinguish between individuals with similar first and last names and should reflect the initials as provided by the individual.
Guide for Use	Record only the initial(s) that appear as part of the individual's full name, such as middle name initials. Do not include the first letter of the first name or last name unless they are explicitly provided as initials. Use uppercase letters without punctuation or spaces. Do not infer or generate initials if they are not explicitly provided.
Column Name	initials
Data Type	Text
Mandatory/Optional	Optional
Example Values	JD, MDC, T

Field Name	**Intended Outcome**
Category & Ingest Template	Grant Category [Provider ID_Dataset #]_grants.csv
Applicable Types	Grant c-contract
Definition	The expected results or impacts of the grant-funded activity.
Guide for Use	Use this field to describe the key outcomes the grant aims to achieve. This may include deliverables, benefits, or changes resulting from the funded work, and supports evaluation and impact reporting. Capturing the intended outcome of science research funding is essential for understanding the purpose and expected impact of funded projects. Outcomes provide a clear link between investment and anticipated benefits, enabling better tracking of progress and alignment with strategic objectives. They can encompass **deliverables** (such as reports, datasets, or prototypes), **milestones** (key achievements or stages in the research process), and broader **intended impacts** (such as advancing knowledge, informing policy, or enabling innovation). Documenting these elements ensures transparency, supports performance monitoring, and facilitates evaluation of whether funded research achieves its goals.
Column Name	c-intended-outcome
Data Type	Text
Format & Length Layout	10,240 characters
Mandatory/Optional	Optional
Validation Rules	None

Field Name	**ISBN-10**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Type	Book Chapter Conference Report Scholarly Edition Other
Definition	An ISBN-10 (International Standard Book Number) is a 10-digit identifier assigned to books and other monographic publications prior to 2007. It uniquely identifies a specific edition of a publication and is used internationally for cataloguing, ordering, and inventory purposes.
Guide for Use	Use this field to record the ISBN-10 associated with the research output, if available. The ISBN-10 should be entered as a 10-digit number, which does not include hyphens (e.g. 0306406152). Ensure the number is accurate and corresponds to the correct edition of the publication. If the output has only an ISBN-13, record that in the separate ISBN-13 field. Do not include prefixes such as "ISBN" or any additional text.
Column Name	isbn-10
Data Type	isbn-10
Format & Length Layout	10 digits only - no hyphens allowed.
Mandatory/Optional	Optional
Validation Rules	Must be a valid ISBN-10.
Example Values	0439023483

Field Name	**ISBN-13**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Type	Book Chapter Conference Report Scholarly Edition Other
Definition	An ISBN-13 (International Standard Book Number) is a 13-digit identifier assigned to books and other monographic publications since 2007. It uniquely identifies a specific edition of a publication and is used globally for cataloguing, distribution, and inventory management.
Guide for Use	Use this field to record the ISBN-13 associated with the research output. The ISBN-13 should be entered as a 13-digit number, which does not include hyphens (e.g. 9783161484100). Ensure the number is accurate and corresponds to the correct edition of the publication. Do not include prefixes such as "ISBN" or any additional text. If the output has only an ISBN-10, record that in the separate ISBN-10 field.
Column Name	isbn-13
Data Type	isbn-13
Format & Length Layout	13 digits only - no hyphens allowed.
Mandatory/Optional	Optional
Validation Rules	Must be valid ISBN-13.
Example Values	9789048551538

Field Name	**Issue**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Conference Journal Article Other
Definition	The specific number, label, or designation of a journal, periodical, or conference proceedings within a particular volume or series, used to identify the publication's release sequence or grouping.
Guide for Use	This field should record the issue number, label, or descriptor as stated in the publication. Use the exact wording provided by the publisher or conference organiser. If no issue is specified, leave the field blank. This information is important for accurately citing journal articles and conference outputs, and for distinguishing between multiple releases or sessions within the same volume or event.
Column Name	issue
Data Type	Text
Mandatory/Optional	Optional
Example Values	Issue 3, No. 2, Spring Issue, Part B, Proceedings of Day 2

Field Name	**ISSN**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Type	Conference Journal Article Report Other
Definition	An ISSN (International Standard Serial Number) is an 8-digit identifier assigned to serial publications such as journals, magazines, and periodicals. It uniquely identifies the title of a serial and is used internationally for cataloguing, subscription management, and citation.
Guide for Use	Use this field to record the ISSN associated with the serial publication in which the research output appears. The ISSN should be entered as an 8-digit number, typically formatted with a hyphen separating the two four-digit segments (e.g. 1234-5678). Ensure the number is accurate and corresponds to the correct title. Do not include prefixes such as "ISSN" or any additional text. If both print and electronic ISSNs exist, record each in their respective fields.
Column Name	issn
Data Type	issn
Format & Length Layout	Must be eight digits separated by a hyphen after four digits.
Mandatory/Optional	Optional
Validation Rules	none
Example Values	0022-3697

Field Name	**Job Title**
Category & Ingest Template	User Category [Provider ID_Dataset #]_users.csv
Definition	This field captures the individual's current job title or position within their organisation.
Guide for Use	Enter the user's official job title as provided by their organisation. This title is not necessarily related to the role of the individual provided as part of a grant record. Use the full title rather than abbreviations or internal codes. Capitalise job titles appropriately and avoid including department names or additional information not part of the title.
Column Name	generic04
Data Type	Text
Mandatory/Optional	Optional
Example Values	Senior Lecturer, Research Fellow, Data Analyst

Field Name	**Journal**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Journal Other
Definition	The full title of the journal or conference proceedings in which a research output is published, used to identify the source of the publication within the scholarly record.
Guide for Use	This field should record the complete name of the journal or conference proceedings exactly as it appears in the publication. Do not abbreviate or modify the title. If the output is not part of a journal or proceedings, leave the field blank. This information is essential for accurate citation, indexing, and retrieval of research outputs.
Column Name	journal
Data Type	Text
Mandatory/Optional	Mandatory (Journal type) Optional (Other type)
Example Values	Journal of Environmental Psychology, Proceedings of the International Conference on Machine Learning
Other Names	Published Proceedings (Conference type)

Field Name	**Keywords**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Book, Performance, Chapter, Fileset, Conference, Figure, Journal Article, Media, Report, Presentation, Scholarly Edition, Poster, Other, Thesis/Dissertation, Artefact, Dataset, Composition, Patent, Design, Software/Code, Exhibition, Internet Publication
Definition	Keywords are descriptive terms or phrases that represent the main topics, themes, or concepts of a research output. They are typically provided by the author as part of the output's metadata (e.g. in the publication record). Keywords are descriptive terms or phrases that represent the main topics, themes, or concepts of a research output. They are used to improve discoverability, facilitate indexing, and enable accurate retrieval of research outputs in databases and search systems. Keywords should reflect the core subject matter and methodologies of the work rather than generic or overly broad terms.
Guide for Use	Use this field to record keywords provided by the author that accurately describe the main topics, themes, or concepts of the research output. Keywords should be specific, relevant, and reflect the subject matter, methodology, theoretical framework, or key findings of the work. Avoid overly broad or ambiguous terms, and where possible, use Standardised or discipline-specific vocabulary. Separate keywords with semicolons and include both technical and contextual terms if appropriate (e.g. "machine learning," "climate adaptation," "Indigenous knowledge systems"). Only use keywords that are provided by the author. Do not derive them from the title, abstract, or main content and do not include punctuation other than separators.
Column Name	keywords
Data Type	Keyword list
Format & Length Layout	Semi-colon delimited
Mandatory/Optional	Optional
Example Values	Climate Change; Coastal Adaptation; Sea-level Rise
Other Names	**Labels (Publication)** (Preprint type)

Field Name	**Known As**
Category & Ingest Template	User Category [Provider ID_Dataset #]_users.csv
Definition	This field captures the name that an individual prefers to be known as, which may differ from their legal name. It is used for informal or preferred identification in communications and user interfaces. The "Known As" name should reflect the individual's chosen spelling and format, and may include shortened forms, nicknames, or alternative given names.
Guide for Use	Enter the name exactly as provided by the individual for their preferred form of address. This may include a nickname (e.g. "Liz" for "Elizabeth") or an alternative given name. Do not include titles (e.g. Mr, Ms, Dr) or generational suffixes (e.g. Jr, Sr). Ensure the name is properly capitalised (e.g. "Alex" rather than "alex" or "ALEX") and matches the individual's stated preference. If no preferred name is provided, leave this field blank.
Column Name	knownas
Data Type	Text
Mandatory/Optional	Optional
Example Values	Caroline

Field Name	**Labels (Grant)**
Category & Ingest Template	Grant Category [Provider ID_Dataset #]_grants.csv
Applicable Types	Grant c-contract c-devolved
Definition	Specific labels from preset schemes used to categorise records.
Guide for Use	Use this field to assign relevant labels from the available schemes that support filtering, searching, or thematic grouping of grants.
Column Name	labels
Data Type	Keyword list – see Label Schemes.
Format & Length Layout	All label entries irrespective of the amount or scheme are stored in this field delimited with pipes and semi-colons. The format is *"label value"|"label scheme identifier"|"percentage"*; for example, ANZSRC Code: 310908 Animal physiology – biophysics|for|50; Sustainable Development Goals: 15 Life on Land|sdg|10
Code Set Reference	See **Label Schemes** section for full list.
Mandatory/Optional	Optional
Validation Rules	Format of field Valid label scheme name Percentage amounts not exceeding 100%
Example Values	450802 Te Whāriki - te mātauranga kōhungahunga Māori (Māori early childhood education)|for-2020|50;160205 Policies and development|seo-2020|85 310803 Plant cell and molecular biology|for-2020|25;CoRE Te Pūnaha Matatini|c-strategic-programme;2 Zero Hunger|sdg;

Field Name	**Labels (Publication)**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Preprint
Definition	Keywords or labels for a preprint are descriptive terms or phrases that represent the main topics, themes, or concepts of the manuscript prior to formal peer review. These are typically provided by the author when submitting the preprint to a repository (e.g. arXiv, bioRxiv) and may also be supplemented by terms derived from the title or abstract if author-supplied keywords are unavailable. Keywords improve discoverability within preprint repositories and indexing systems.
Guide for Use	Use this field to record the keywords or labels associated with the preprint as provided by the author in the repository metadata. Keywords should be specific and relevant to the research content, including disciplinary terms, methodologies, and contextual elements such as geographic or cultural focus. Avoid overly broad or generic terms, and separate keywords with semicolons. Do not include punctuation other than separators, and ensure the terms reflect the language of the manuscript.
Column Name	keywords
Data Type	Keyword list
Format & Length Layout	Semi-colon delimited
Mandatory/Optional	Optional
Example Values	Climate Change; Coastal Adaptation Seal-level Rise
Other Names	**Keywords** (Book type) **Keywords** (Chapter type) **Keywords** (Conference type) **Keywords** (Journal Article type) **Keywords** (Report type) **Keywords** (Scholarly Edition type) **Keywords** (Other type) **Keywords** (Artefact type) **Keywords** (Composition type) **Keywords** (Design type) **Keywords** (Exhibition type) **Keywords** (Performance type) **Keywords** (Fileset type) **Keywords** (Figure type) **Keywords** (Media type) **Keywords** (Presentation type) **Keywords** (Poster type) **Keywords** (Thesis/Dissertation type) **Keywords** (Dataset type) **Keywords** (Patent type) **Keywords** (Software / Code type) **Keywords** (Internet Publication type)

Field Name	**Last Name**
Category & Ingest Template	User Category [Provider ID_Dataset #]_users.csv
Definition	This field captures the family name or surname of the user. It is used to formally identify individuals and may reflect cultural naming conventions, including compound or hyphenated surnames. The last name should be recorded using correct spelling and capitalisation.
Guide for Use	Enter the user's last name (surname or family name) exactly as it is provided by the individual. This may include compound or hyphenated names (e.g. "Smith-Jones") and should reflect the individual's preferred spelling and format. Do not include titles (e.g. Mr, Ms, Dr) or generational suffixes (e.g. Jr, Sr) unless they are an official part of the surname. Ensure the name is properly capitalised (e.g. "Nguyen" rather than "nguyen" or "NGUYEN").
Column Name	lastname
Data Type	Text
Mandatory/Optional	Mandatory
Example Values	Nguyen, Smith-Jones
Other Names	**Surname**

Field Name	**Location**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Artefact Other
Definition	The city or location where an artefact or other research output was presented, exhibited, performed, or otherwise associated with a conference or formal event.
Guide for Use	This field should record the full name of the city or location where the conference took place. Include additional geographic identifiers such as state or country if needed for clarity (e.g. "Cambridge, UK" vs. "Cambridge, MA"). Do not abbreviate or modify the place name. If the conference was held online or virtually, record as "Online" or "Virtual" as appropriate. This information is important for citation, indexing, and understanding the context and reach of the conference output.
Column Name	location
Data Type	Text
Mandatory/Optional	Optional
Example Values	Berlin, DE, Wellington, NZ, San Francisco, USA
Other Names	**Conference Place** (Conference type) **Country** (Journal Article type) **Venue** (Exhibition type) **Place of Performance** (Performance type) **Presentation Location** (Presentation type) **Territory** (Patent type)

Field Name	**Medium**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Book Composition Chapter Design Conference Exhibition Journal Article Performance Report Media Scholarly Edition Patent Other Software/Code Artefact Internet Publication
Definition	The format, material, or delivery method through which a research output is created, presented, or made accessible, reflecting its physical, digital, or conceptual nature.
Guide for Use	This field should describe the medium of the output using the terminology provided by the creator, publisher, or venue. Use the exact wording where available; otherwise, provide a clear and concise description. If the medium is not specified or not applicable, leave the field blank. This information is important for understanding how the output is experienced, accessed, or preserved, and supports accurate classification and discovery across diverse research types.
Column Name	medium
Data Type	Text
Mandatory/Optional	Optional
Example Values	Oil on canvas, Digital audio, Web-based software, Live performance, Online journal, Printed book, Video recording, Interactive installation

Field Name	**Name (Grant)**
Category & Ingest Template	Grant Category [Provider ID_Dataset #]_grants.csv
Applicable Types	c-contract c-devolved
Definition	The main title of the contract or grant-funded project.
Guide for Use	Enter a clear and descriptive title that reflects the purpose or focus of the contract. Avoid abbreviations unless they are widely recognised or necessary for clarity.
Column Name	title
Data Type	Text
Format & Length Layout	10,240 characters
Mandatory/Optional	Mandatory
Other Names	**Title (Grant)** (Grant type)

Field Name	**Name (Fund)**
Category & Ingest Template	Equipment Category [Provider ID_Dataset #]_equipment.csv
Applicable Types	All
Definition	The official name of the fund or funding round.
Guide for Use	Enter a clear and descriptive name that reflects the full legal or commonly recognised title, avoiding abbreviations unless they are part of the official name. Consistency in naming across systems and documentation is important to ensure clarity and accurate referencing.
Column Name	name
Data Type	Text
Format & Length Layout	10,240 characters
Mandatory/Optional	Mandatory
Example Values	c-fund: Endeavour Fund c-funding-round: 2021 Endeavour Fund – Smart Ideas c-appropriation: Science and Innovation: Strategic Science Investment Fund (M84)

Field Name	**Name of Conference**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Conference
Definition	The official title of the academic or professional conference at which a research output was presented or published, used to identify the event associated with the work.
Guide for Use	This field should record the full name of the conference exactly as stated in the publication or event materials. Do not abbreviate or modify the title. If the output is not associated with a conference, leave the field blank. This information is important for citation, indexing, and understanding the context in which the research was disseminated.
Column Name	name-of-conference
Data Type	Text
Mandatory/Optional	Optional
Example Values	International Conference on Urban Sustainability, IEEE Symposium on Robotics and Automation
Other Names	**Presented At** (Poster type) **Presented At** (Thesis/Dissertation type)

Field Name	**Notes**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	All except Preprint
Definition	A free-text field used to capture additional contextual, explanatory, or clarifying information about a research output that is not covered by other structured fields.
Guide for Use	This field may be used to record relevant details such as acknowledgements, funding information, publication nuances, special circumstances, or relationships to other outputs. Use clear and concise language and avoid duplicating information already captured in other fields. This information supports richer understanding, accurate interpretation, and improved discoverability of the research output.
Column Name	notes
Data Type	Text
Mandatory/Optional	Optional
Example Values	This chapter is an expanded version of a conference paper presented in 2023, Funded by the XYZ Research Council, published as part of a curated exhibition.

Field Name	**ORCiD**
Category & Ingest Template	User Category [Provider ID_Dataset #]_users.csv [Provider ID_Dataset #]_persons.csv
Definition	This field captures the user's ORCiD (Open Researcher and Contributor ID), a globally unique identifier used to distinguish individual researchers and connect them with their research outputs and affiliations.
Guide for Use	Enter the user's full 16-digit ORCiD in the standard format, including hyphens (e.g. 0000-0002-1825-0097). Ensure the ORCiD is valid and has been provided by the individual. Do not enter placeholder values or internal identifiers. If the user does not have an ORCiD, leave the field blank.
Column Name	generic02
Data Type	Text
Format & Length Layout	Sixteen digits separated with a hyphen after the fourth, eighth, and twelve digit.
Mandatory/Optional	Optional
Example Values	0000-0002-1825-0097

Field Name	**Organisation (User)**
Category & Ingest Template	User Category [Provider ID_Dataset #]_users.csv Grant Category [Provider ID_Dataset #]_collaborating-organisations.csv [Provider ID_Dataset #]_persons.csv
Definition	This field captures the name of the organisation with which the individual is currently affiliated, or the name of the collaborating organisation.
Guide for Use	Enter the full, official name of the organisation. Avoid abbreviations, acronyms, or internal codes unless they are part of the official name. Ensure correct spelling and capitalisation. If the user is affiliated with multiple organisations, use a semi colon to delimit the entries.
Column Name	generic03 name
Data Type	Text
Mandatory/Optional	Optional
Example Values	University of Otago; Cawthron Institute

Field Name	**Organisation Name**
Category & Ingest Template	External Organisation Category [Provider ID_Dataset #]_organisations.csv
Applicable Types	c-organisation
Definition	The official name of an organisation as recognised in legal, administrative, or public records.
Guide for Use	This field should record the full, formal name of the organisation, including any legally registered suffixes (e.g. Ltd, Inc, Trust, Ministry). Use the name exactly as it appears in authoritative sources such as the NZBN Register, Companies Office, government directories, or the organisation's own documentation. Avoid abbreviations, acronyms, or informal references in this field. If the organisation has changed its name over time, record the current official name in this field and use separate fields (e.g. Alternative Name or Additional Aliases) to capture historical or informal variations.
Column Name	name
Data Type	Text
Format & Length Layout	10,240 characters
Mandatory/Optional	Mandatory
Example Values	Ministry of Business, Innovation and Employment, Te Herenga Waka – Victoria University of Wellington

Field Name	**Organisation Type**
Category & Ingest Template	External Organisation [Provider ID_Dataset #]_organisations.csv
Applicable Types	c-organisation
Definition	The classification of the organisation based on a predefined set of categories that describe its role or structure within the research funding system.
Guide for Use	Select the most appropriate type that reflects the organisation's primary function or legal status in relation to research funding from the available types in the Organisation Types section. This information is essential for consistent categorisation, filtering, and analysis across datasets. Only use values from the designated list to ensure alignment with controlled vocabulary and interoperability with other systems. If an organisation fits multiple types, use the type for the organisation's primary form or function.
Column Name	c-types
Data Type	Keyword list
Code Set Reference	See **Organisation Types** section for full list
Allowed values	G Government G01 Regional Council G02 Territorial Authority E Education E01 University E02 Polytechnic E03 Wānanga R Research R01 Company R02 Not-for-profit R03 Crown Research Institute R04 Public Research Organisation N Non-research Organisation N01 Company N02 Not-for-profit O Other
Mandatory/Optional	Optional
Example Values	Government, Company, University

Field Name	**Output Language**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Type	Chapter Conference Journal Article Preprint Other
Definition	The language in which the publication or output is written if not English.
Guide for Use	Use this field to indicate the language of the output using ISO 639-2 codes. This supports accessibility, translation, and multilingual reporting.
Column Name	language
Data Type	Text
Format & Length Layout	3 characters
Code Set Reference	See **Language Codes** section
Mandatory/Optional	Optional
Example Values	mao, cri

Field Name	**Pagination**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Book Chapter Conference Journal Article Report Scholarly Edition Other
Definition	The page range or page count that indicates the physical or digital extent of a research output within its published format, used to identify its location in a larger work or to describe its length.
Guide for Use	This field should record the page numbers exactly as they appear in the publication. Use the publisher's formatting, including any prefixes or suffixes (such as "e" for electronic pages). For standalone outputs such as reports, theses, or creative works, this field may reflect total page count (e.g. "120 pages"). If no pagination is provided, leave the field blank. This information is important for accurate citation, indexing, and understanding the scope and placement of the research output within its published context.
Column Name	pagination-full
Data Type	Pagination
Mandatory/Optional	Optional
Example Values	pp. 45–62, e102–e110, 1–12

Field Name	**Parent Contract Reference**
Category & Ingest Template	Grant Category [Provider ID_Dataset #]_grants.csv
Applicable Types	c-contract c-payment c-devolved
Definition	The reference number of a parent or overarching contract related to the grant.
Guide for Use	Use this field to link the grant to a broader contract or funding agreement. This supports hierarchical tracking and helps establish relationships between related records.
Column Name	c-parent-contract-reference
Data Type	Text
Format & Length Layout	255 characters – multiple entries semi-colon delimited
Mandatory/Optional	Optional
Example Values	UOOX2199

Field Name	**Parent Organisation**
Category & Ingest Template	External Organisation Category [Provider ID_Dataset #]_organisations.csv
Applicable Types	c-organisation
Definition	A structured list of identifiers that link the organisation to one or more parent entities that oversee, own, or govern it.
Guide for Use	This field should record persistent identifiers (e.g. NZBN, ROR, GRID) associated with the entity. Each entry should include the chosen scheme and identifier/s for the organisation. Use accurate and current identifiers that reflect formal relationships such as ministerial oversight, institutional affiliation, or corporate ownership. This information is essential for understanding organisational hierarchy, enabling data integration, and supporting reporting and governance structures. If multiple identifiers exist, record each one clearly and consistently using the identifier-list format. This field should contain the identifier/s of an entity as a single string, with components separated by colon and semicolon (: ;) characters. The components must appear in the following order: scheme : identifier ; scheme : identifier ; scheme : identifier **Scheme**: Provide the fixed-entry identifier type: • ror-id • grid-id • nzbn **Identifier**: Use the official research organisation or business identifier, to uniquely identify the entity.
Column Name	parent-organisation-identifiers
Data Type	Identifier-list
Mandatory/Optional	Optional
Example Values	ror-id:https://ror.org/01jmxt844; grid-id:grid.xyzgridID;nzbn:987654321099

Field Name	**Patent Number**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Patent
Definition	A unique identifier assigned to a granted patent by the relevant intellectual property office, used to officially recognise and reference the patent in legal, academic, and commercial contexts.
Guide for Use	This field should record the full patent number exactly as it appears in the official documentation. Include any country or regional code, formatting, or suffixes provided by the issuing authority. Do not abbreviate or alter the number. If the patent has not yet been granted, leave this field blank and use the **Application Number** field instead. This information is essential for accurate citation, legal referencing, and verification of the patent's granted status.
Column Name	Patent-number
Data Type	Text
Mandatory/Optional	Optional
Example Values	US 10,123,456 B2, EP 3456789 A1, AU 2025101234

Field Name	**Patent Status**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Patent
Definition	The current stage or condition of a patent application or granted patent at the time the data is recorded, indicating its progress within the intellectual property lifecycle (e.g. filed, under examination, granted, expired).
Guide for Use	This field should record the patent status as it appears in the official documentation or patent database at the time the data is provided to NZRIS. Use the exact terminology provided by the relevant patent office. This field must be accompanied by the **Filed Date** to provide context for the status. This information is essential for understanding the legal and procedural standing of the patent output and for tracking its progression over time.
Column Name	patent-status
Data Type	Text
Mandatory/Optional	Optional
Example Values	Filed, Under Examination, Granted, Withdrawn, Expired

Field Name	**Payment Date**
Category & Ingest Template	Grant Category [Provider ID_Dataset #]_grants.csv
Applicable Type	Grant
Definition	The calendar <u>year</u> in which the payment was made.
Guide for Use	Use this field to record the total amount paid for a calendar year against a science research grant. This provides a high-level view of funding flow without tracking expenditure at a forensic level. This approach supports transparency and enables monitoring of how funds are distributed over time, while avoiding misleading assumptions about project activity within the year. By recording only annual totals, inaccurate inferences are prevented for projects that may pause or experience variable activity during the contract term. This aggregated view is useful for ensuring that overall investment aligns with strategic priorities.
Column Name	award-date
Data Type	Date
Format & Length Layout	(yyyy)
Mandatory/Optional	Mandatory
Validation Rules	Must comply with the format yyyy.
Example Values	2025
Other Names	**Award Date (Grant)** (Grant type)

Field Name	**Payment Reference**
Category & Ingest Template	Grant Category [Provider ID_Dataset #]_grants.csv
Applicable Types	c-payment
Definition	A reference number associated with financial transactions or payments made under the grant.
Guide for Use	Use this field to record the payment identifier used by financial systems to track disbursements. This supports reconciliation, audit processes, and financial reporting.
Column Name	c-payment-reference
Data Type	Text
Format & Length Layout	255 characters – multiple entries semi-colon delimited
Mandatory/Optional	Mandatory
Validation Rules	Must match the data provided in ID field for c-payment type.

Field Name	**Place of Performance**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Performance
Definition	The city or location where the performance-based research output was presented or enacted. This refers to the physical or virtual site where the creative work – such as a theatrical production, musical recital, dance performance, or other live or recorded performance – was delivered to an audience as part of a formal event, festival, or curated programme.
Guide for Use	This field should record the full name of the city or location where the performance took place. Include additional geographic identifiers such as state or country if needed for clarity (e.g. "Sydney, Australia" vs. "Sydney, Nova Scotia"). Do not abbreviate or modify the place name. If the performance was held online or virtually, record as "Online" or "Virtual" as appropriate. If the performance was part of a tour or occurred at multiple venues, record the primary or first location where the research output was performed. This information is important for citation, indexing, and understanding the context and reach of the performance output.
Column Name	location
Data Type	Text
Mandatory/Optional	Optional
Example Values	Berlin, DE, Wellington, NZ, San Francisco, USA
Other Names	**Conference Place** (Conference type) **Country** (Journal Article type) **Location** (Artefact type) **Location** (Other type) **Presentation Location** (Presentation type) **Territory** (Patent type) **Venue** (Exhibition type)

Field Name	**Place of Publication**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Book Chapter Conference Report Other Software/Code
Definition	The city or location where the publisher or issuing organisation is based, or where the research output was formally published or made publicly available.
Guide for Use	This field should record the place of publication exactly as stated in the output or official documentation. Use the full name of the city or location without abbreviation, and do not include country names unless necessary for clarity (e.g. "Cambridge, UK" vs. "Cambridge, MA"). This field applies to outputs such as software/code, books, book chapters, conference proceedings, reports, and other formally published works. This information supports accurate citation, provenance tracking, and contextual understanding of the publication's origin.
Column Name	place-of-publication
Data Type	Text
Mandatory/Optional	Optional
Example Values	London, New York, Canberra

Field Name	**Predecessor Organisation**
Category & Ingest Template	External Organisation Category [Provider ID_Dataset #]_organisations.csv
Applicable Types	c-organisation
Definition	A structured list of identifiers that link the organisation to any entities that previously fulfilled its role, functions, or mandate.
Guide for Use	This field should record persistent identifiers (e.g. NZBN, ROR, GRID) associated with the entity. Each entry should include the chosen scheme and identifier/s for the organisation. Use accurate and current identifiers that reflect formal relationships such as ministerial oversight, institutional affiliation, or corporate ownership. This information is essential for understanding organisational hierarchy, enabling data integration, and supporting reporting and governance structures. If multiple identifiers exist, record each one clearly and consistently using the identifier-list format. This field should contain the identifier/s of an entity as a single string, with components separated by colon and semicolon (: ;) characters. The components must appear in the following order: scheme : identifier ; scheme : identifier ; scheme : identifier **Scheme**: Provide the fixed-entry identifier type: • ror-id • grid-id • nzbn **Identifier**: Use the official research organisation or business identifier, to uniquely identify the entity.
Column Name	preceded-by-organisation-identifiers
Data Type	Identifier-list
Format & Length Layout	scheme:identifier
Mandatory/Optional	Optional
Example Values	ror-id:https://ror.org/01jmxt844; grid-id:grid.xyzgridID;nzbn:987654321099

Field Name	**Preprint Server**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Preprint
Definition	The online platform or repository where a research output is made publicly available prior to formal peer review or publication, typically to facilitate early dissemination and feedback.
Guide for Use	This field should record the full name of the preprint server exactly as listed on the publication. Do not abbreviate or modify the name. If the output is not associated with a preprint server, leave the field blank. This information is important for identifying the source of early-stage research, supporting transparency, and enabling proper citation and discovery of preprint materials.
Column Name	parent-title
Data Type	Text
Mandatory/Optional	Optional
Example Values	arXiv, bioRxiv, SSRN, medRxiv
Other Values	**Book Title** (Book type) **Report Title** (Report type)

Field Name	**Presentation Date**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Type	Presentation Poster
Definition	The date on which the presentation or poster was formally delivered or displayed to an audience, typically at a conference, seminar, workshop, or similar event. This marks the point of public dissemination and engagement with the research or creative work.
Guide for Use	Use this field to record the actual date the presentation or poster was presented. This is usually the date of the scheduled session or event where the output was shared. For **presentations**, use the date the speaker delivered the talk or lecture. For **posters**, use the date the poster was displayed and available for viewing during the event. This field supports tracking of dissemination activities, aligning with event timelines, and reporting on research engagement. If the presentation or poster was part of a multi-day event, use the specific date of delivery or display rather than the full event duration.
Column Name	publication-date
Data Type	Date
Format & Length Layout	(yyyy-mm-dd)
Mandatory/Optional	Mandatory for Poster type Optional for Presentation type
Validation Rules	Must comply with the format yyyy-mm-dd.
Example Values	2025-04-25
Other Names	**Date Awarded** (Thesis/Dissertation type) **Production Date** (Book type) **Production Date** (Chapter type) **Production Date** (Conference type) **Production Date** (Journal Article type) **Publication Date** (Artefact type) **Publication Date** (Composition type) **Publication Date** (Design type) **Publication Date** (Preprint type) **Publication Date** (Dataset type) **Publication Date** (Patent type) **Publication Date** (Software / Code type) **Publication Date** (Internet Publication type) **Publication Date** (Report type) **Publication Date** (Scholarly Edition type) **Publication Date** (Other type)

Field Name	**Presentation Location**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Presentation
Definition	The city or location where the presentation of the research output was delivered. This refers to the physical or virtual site where the researcher formally presented their work – such as at a seminar, symposium, workshop, public lecture, or other academic or professional event.
Guide for Use	This field should record the full name of the city or location where the presentation took place. Include additional geographic identifiers such as state or country if needed for clarity (e.g. "Auckland, New Zealand" vs. "Auckland, Washington"). Do not abbreviate or modify the place name. If the presentation was delivered online or virtually, record as "Online" or "Virtual" as appropriate. If the presentation was part of a multi-location event or tour, record the primary or first location where the research output was presented. This information is important for citation, indexing, and understanding the context and reach of the presentation output.
Column Name	location
Data Type	Text
Mandatory/Optional	Optional
Example Values	Berlin, DE, Wellington, New Zealand, San Francisco, USA
Other Names	**Conference Place** (Conference type) **Country** (Journal Article type) **Location** (Artefact type) **Location** (Other type) **Place of Performance** (Performance type) **Territory** (Patent type) **Venue** (Exhibition type)

Field Name	**Presented At**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Poster Thesis/Dissertation
Definition	The official title of the academic or professional conference at which a research output was presented or published, used to identify the event associated with the work.
Guide for Use	This field should record the full name of the conference exactly as stated in the publication or event materials. Do not abbreviate or modify the title. If the output is not associated with a conference, leave the field blank. This information is important for citation, indexing, and understanding the context in which the research was disseminated.
Column Name	name-of-conference
Data Type	Text
Mandatory/Optional	Optional
Example Values	International Conference on Urban Sustainability, IEEE Symposium on Robotics and Automation
Other Names	**Name of Conference** (Conference type)

Field Name	**Primary Group Descriptor**
Category & Ingest Template	User Category [Provider ID_Dataset #]_users.csv
Definition	This field captures the three-character code that identifies the data provider associated with the user. It is used to group users by their primary organisation or affiliation.
Guide for Use	Enter the three-character data provider code that corresponds to the data provider's organisation. The data provider code will be provided to the organisation by the NZRIS team during the onboarding process. A list of codes will also be available on the NZRIS Github site. This field is mandatory and must not be left blank.
Column Name	primarygroupdescriptor
Data Type	Text
Format & Length Layout	3 characters
Mandatory/Optional	Mandatory
Example Values	MBE, ROY

Field Name	**Production Date**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Type	Book Chapter Conference Journal Article
Definition	The date on which the output is formally published or made publicly accessible. Despite the term "Production Date," this field is used to capture the **Publication Date** – the point at which the work becomes available to its intended audience through a publisher, platform, or event.
Guide for Use	Use this field to record the official publication or release date of the output. For **books and chapters**, use the date provided by the publisher indicating when the work was released. For **journal articles**, use the date the article was published online or in print by the journal. For **conference outputs**, use the date the presentation or proceedings were made publicly available, either at the event or through publication. This field supports tracking of dissemination timelines, reporting cycles, and citation eligibility. Ensure the date reflects formal public availability rather than internal production milestones.
Column Name	publication-date
Data Type	Date
Format & Length Layout	(yyyy-mm-dd)
Mandatory/Optional	Mandatory for Book type Mandatory for Chapter type Mandatory for Journal Article type Optional for Conference type
Validation Rules	Must comply with the format yyyy-mm-dd.
Example Values	2025-04-25
Other Names	**Presentation Date** (Presentation type) **Presentation Date** (Poster type) **Awarded Date (Publication)** (Thesis/Dissertation type) **Publication Date** (Artefact type) **Publication Date** (Composition type) **Publication Date** (Design type) **Publication Date** (Preprint type) **Publication Date** (Dataset type) **Publication Date** (Patent type) **Publication Date** (Software / Code type) **Publication Date** (Internet Publication type) **Publication Date** (Report type) **Publication Date** (Scholarly Edition type) **Publication Date** (Other type)

Field Name	**Proprietary_ID**
Category & Ingest Template	User Category [Provider ID_Dataset #]_users.csv
Definition	This field captures a unique identifier for each user to support accurate record matching and updates over time. It must not be the unique identifier from the data provider's internal systems, in accordance with the New Zealand Privacy Act. NZRIS recommends the use of an individual's ORCiD id, a deterministic hashed identifier or a provider-scoped opaque identifier.
Guide for Use	Provide a unique identifier for each user that remains consistent across data submissions. Do not use internal system IDs. Accepted identifier types are: **ORCID id** – where available, provide the individual's ORCID id in the format xxxx-xxxx-xxxx-xxxx (e.g. 0000-0002-1825-0097). **Deterministic hashed identifier** – a consistently generated hash value derived using the same inputs and hashing method each time, producing the same identifier for the same individual. **Provider-scoped opaque identifier** – a randomly assigned, system-generated value with no intrinsic meaning, reused consistently for the same individual (e.g. NZRIS-7XQ4M9K2A8EJ6R1F3P5CWTUD). The identifier must not be an internal system person identifier and must not disclose, encode, or be directly derived from organisation-specific identifiers or personal attributes (such as names, staff numbers, or email addresses). The identifier must be created once per individual and be maintained consistently by the provider over time, regardless of the identifier type used. This field is mandatory, must be unique per individual, and must not exceed 32 characters in length.
Column Name	proprietary_id
Data Type	Text
Format & Length Layout	32 characters
Mandatory/Optional	Mandatory
Validation Rules	No spaces
Example Values	0902-0234-3547-3482

Field Name	**Protected (Fund)**
Category & Ingest Template	Equipment Category [Provider ID_Dataset #]_equipment.csv
Applicable Type	c-fund c-funding-round c-scholarship c-internship c-fellowship c-negotiated c-on-demand c-other
Definition	Indicates whether the equipment record contains sensitive or restricted information and should be restricted from the NZRIS website.
Guide for Use	Use this field to flag records that require limited access or special handling due to confidentiality, privacy, or data protection requirements. If the flag is set to "1" the record will be excluded from the NZRIS website.
Column Name	c-protected
Data Type	Boolean
Allowed Values	true or false
Mandatory/Optional	Mandatory

Field Name	**Protected (Grant)**
Category & Ingest Template	Grant Category [Provider ID_Dataset #]_grants.csv
Applicable Type	All
Definition	Indicates whether the grant record contains sensitive or restricted information and should be restricted from the NZRIS website.
Guide for Use	Use this field to flag records that require limited access or special handling due to confidentiality, privacy, or data protection requirements. If the flag is set to "1" the record will be excluded from the NZRIS website.
Column Name	c-protected
Data Type	Boolean
Allowed Values	true or false
Mandatory/Optional	Mandatory

Field Name	**Protected (Publication)**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publication.csv
Applicable Type	All
Definition	Indicates whether the publication record contains sensitive or restricted information and should be restricted from the NZRIS website.
Guide for Use	Use this field to flag records that require limited access or special handling due to confidentiality, privacy, or data protection requirements. If the flag is set to "1" the record will be excluded from the NZRIS website.
Column Name	c-protected
Data Type	Boolean
Allowed Values	true or false
Mandatory/Optional	Optional

Field Name	**Protected (User)**
Category & Ingest Template	User Category [Provider ID_Dataset #]_users.csv
Definition	Indicates whether the user record should be restricted from the NZRIS website.
Guide for Use	Use this field to designate user records that require limited access or special handling due to confidentiality, privacy, or data protection requirements. If the flag is set to "1" the record will be excluded from the NZRIS website.
Column Name	generic01
Data Type	Boolean
Allowed Values	true or false
Mandatory/Optional	Mandatory

Field Name	**Publication Date**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Type	Artefact Composition Design Preprint Dataset Patent Software/Code Internet Publication Report Scholarly Edition Other
Definition	The date on which the output is formally published, released, or made publicly accessible. This marks the point at which the work becomes available to its intended audience, whether through a publisher, platform, repository, or public release.
Guide for Use	Use this field to record the official date the output was made publicly available. This may be the date listed by a publisher, repository, or hosting platform, and is used to track dissemination, support reporting, and assess impact. **Artefact, Composition, Design**: Use the date the work was exhibited, performed, launched, or otherwise released to the public. **Preprint**: Use the date the preprint was uploaded to a public repository or platform. **Dataset**: Use the date the dataset was published or deposited in a public data repository. **Patent**: Use the date the patent was officially published by the intellectual property authority (distinct from filing or grant dates). **Software/Code**: Use the date the software or code was released or made publicly accessible (e.g. via GitHub, institutional repository). **Internet Publication**: Use the date the content was published online (e.g. blog post, web article). **Report**: Use the date the report was formally published or distributed. **Scholarly Edition**: Use the date the edition was published or released by the publisher or institution.
Column Name	publication-date
Data Type	Date
Format & Length Layout	(yyyy-mm-dd)
Mandatory/Optional	Optional
Validation Rules	Must comply with the format yyyy-mm-dd.
Example Values	2025-04-25
Other Names	**Production Date** (Book type) **Production Date** (Chapter type) **Production Date** (Conference type) **Production Date** (Journal Article type) **Presentation Date** (Presentation type) **Presentation Date** (Poster type) **Date Awarded** (Thesis/Dissertation type)

Field Name	**Published Proceedings**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Conference
Definition	The full title of the journal or conference proceedings in which a research output is published, used to identify the source of the publication within the scholarly record.
Guide for Use	This field should record the complete name of the journal or conference proceedings exactly as it appears in the publication. Do not abbreviate or modify the title. If the output is not part of a journal or proceedings, leave the field blank. This information is essential for accurate citation, indexing, and retrieval of research outputs.
Column Name	journal
Data Type	Text
Mandatory/Optional	Optional
Example Values	Journal of Environmental Psychology, Proceedings of the International Conference on Machine Learning
Other Names	**Journal** (Journal type) **Journal** (Other type)

Field Name	**Publisher**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Book Chapter Conference Journal Article Report Scholarly Edition Other Software/Code Internet Publication
Definition	The individual, organisation, or entity responsible for producing, distributing, or making a research output publicly available, whether in print, digital, or other formats.
Guide for Use	This field should record the name of the publisher exactly as it appears in the publication or official documentation. Do not abbreviate or modify the name. If no publisher is specified, leave the field blank. This information is important for citation, provenance, and understanding the source and dissemination pathway of the research output.
Column Name	publisher
Data Type	Text
Mandatory/Optional	Optional
Example Values	Springer Nature, Oxford University Press, Australian Bureau of Statistics, Zenodo

Field Name	**Publisher URL**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Report Performance Scholarly Edition Thesis/Dissertation Other Preprint Artefact Dataset Composition Patent Design Software/Code Exhibition Internet Publication
Definition	The web address that links directly to the published version or official landing page of a research output, as hosted by the publisher, journal, conference organiser, or platform.
Guide for Use	This field should record the full and direct URL to the research output as provided by the publisher or hosting organisation. Use the exact link without modification or shortening. For books, chapters, conference papers, and journal articles, use the **Uniform Resource Locator (URL)** field. This information is essential for enabling access, verification, and citation of the research output, especially in digital environments.
Column Name	publisher-url
Data Type	url
Format & Length Layout	URLs should be recorded in their full and direct format, beginning with http:// or https://, exactly as provided by the publisher, platform, or hosting organisation. Avoid using shortened or redirected links (e.g. Bitly), and do not embed hyperlinks within other text – record the URL as plain text only. Ensure the URL is not followed by punctuation such as a full stop or comma unless required by external citation formatting. Always verify that the link leads directly to the intended research output or landing page and is publicly accessible where possible.
Mandatory/Optional	Optional
Example Values	https://springer.com/book/9783030123456
Other Names	**URL** (Book type) **URL** (Chapter type) **URL** (Conference type) **URL** (Journal Article type)

Field Name	**Recipient Organisation**
Category & Ingest Template	Grant Category [Provider ID_Dataset #]_grants.csv
Applicable Types	All
Definition	The organisation that receives and administers the grant funding.

Guide for Use	Use this field to record the full name of the recipient organisation. This supports reporting, analysis, and identification of funding sources across grant records. The identifier for the organisation should also be included.
	
	This field should contain the name and identifiers of an entity as a single string, with components separated by pipe, colon, and semi-colon (| : ;) characters. The components must appear in the following order:
	
	Organisation Name | scheme : identifier ; scheme : identifier ; scheme : identifier
	
	Organisation Name: Include the full name of the organisation.
	
	Scheme: Provide the fixed-entry identifier type
	
	    • ror-id
	    • grid-id
	    • nzbn
	
	Identifier: Use the official research organisation or business identifier, to uniquely identify the entity.
	
	A single organisation identifier is sufficient however multiple identifiers can be provided using a semi-colon.
	
	If a grant has multiple recipient organisations, a separate grant record should be submitted for each organisation, with the total grant value proportionally split across those records.

Column Name	c-recipient-organisation
Data Type	Text
Format & Length Layout	Organisation Name | scheme : identifier ; Use pipe and colon delimiters (" | " " : " " ; ")
Mandatory/Optional	Mandatory c-contract type Mandatory c-payment type Mandatory c-devolved type Optional Grant type
Example Values	University of Otago|ror-id:https://ror.org/01jmxt844;grid-id:grid.xyzgridID;nzbn:987654321099

Field Name	**Related Organisation**
Category & Ingest Template	External Organisation Category [Provider ID_Dataset #]_organisations.csv
Applicable Types	c-organisation
Definition	A structured list of identifiers that link the organisation to other entities with which it has a formal or functional relationship.
Guide for Use	This field should record persistent identifiers (e.g. NZBN, ROR, GRID) associated with the entity. Each entry should include the chosen scheme and identifier/s for the organisation. Use accurate and current identifiers that reflect formal relationships such as ministerial oversight, institutional affiliation, or corporate ownership. This information is essential for understanding organisational hierarchy, enabling data integration, and supporting reporting and governance structures. If multiple identifiers exist, record each one clearly and consistently using the identifier-list format.

This field should contain the identifier/s of an entity as a single string, with components separated by colon and semicolon (: ;) characters. The components must appear in the following order:

scheme : identifier ; scheme : identifier ; scheme : identifier

Scheme: Provide the fixed-entry identifier type:

- ror-id
- grid-id
- nzbn

Identifier: Use the official research organisation or business identifier, to uniquely identify the entity.

Column Name	related-organisation-identifiers
Data Type	Identifier-list
Format & Length Layout	scheme:identifier
Mandatory/Optional	Optional
Example Values	ror-id:https://ror.org/01jmxt844; grid-id:grid.xyzgridID;nzbn:987654321099

Field Name	**Report Number**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Report
Definition	A unique identifier assigned to a report by the issuing organisation, used to distinguish it from other reports and to support accurate referencing and retrieval.
Guide for Use	This field should record the report number exactly as it appears on the publication. Use the organisation's wording and formatting without modification. This information is important for citation, cataloguing, and ensuring the correct version of a report is referenced.
Column Name	number
Data Type	Text
Mandatory/Optional	Optional
Example Values	Report No. 2025/04, TR-17-003, Document ID: ENV-202
Other Names	**Chapter Number** (Book type) **Chapter Number** (Chapter type) **Article Number** (Journal Article type) **Application Number** (Patent type)

Field Name	**Report Title**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Report
Definition	The full title of a formal research report, technical report, or institutional publication that presents findings, analysis, or recommendations, typically commissioned or authored by an organisation, agency, or research group.
Guide for Use	This field should record the complete title of the report exactly as it appears on the publication. Do not abbreviate or modify the title. This information is essential for accurate citation, indexing, and identifying the nature and scope of the research presented.
Column Name	parent-title
Data Type	Text
Mandatory/Optional	Optional
Example Values	Annual Report on Water Quality Monitoring, Technical Report on AI Ethics in Public Services
Other Values	**Preprint Server** (Preprint type) **Book Title** (Book type)

Field Name	**Series**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Book Chapter Other
Definition	The named collection or sequence of related works published under a common title or theme, often by the same publisher, which groups books or chapters that share a subject area, format, or editorial framework.
Guide for Use	This field should record the series title exactly as stated in the publication. Use the publisher's wording without modification. If the work is not part of a series, leave the field blank. This information helps identify the broader context or scholarly grouping of the work, and is useful for cataloguing, citation, and understanding the thematic or disciplinary alignment of the output.
Column Name	series
Data Type	Text
Mandatory/Optional	Optional
Example Values	Lecture Notes in Computer Science, Studies in Language and Linguistics

Field Name	**Start Date (Grant)**
Category & Ingest Template	Grant Category [Provider ID_Dataset #]_grants.csv
Applicable Types	All
Definition	The date on which the grant-funded activity or contract begins.
Guide for Use	Use this field to record the official start date of the grant. This is used for scheduling, milestone tracking, and financial planning.
Column Name	start-date
Data Type	Date
Format & Length Layout	(yyyy-mm-dd)
Mandatory/Optional	Mandatory c-contract type Mandatory c-devolved type Optional Grant type Optional c-payment type
Validation Rules	Must comply with the format yyyy-mm-dd.
Example Values	2025-04-25

Field Name	**Start Date (Publication)**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Type	Exhibition Performance Other
Definition	The date on which the creation, development, or public presentation of the output begins. This marks the initiation of substantive work or the commencement of public engagement, depending on the nature of the output.
Guide for Use	Use this field to record the actual or planned start date of the output. This helps track timelines, monitor progress, and support reporting and evaluation processes. For **Exhibitions**, use the opening date – the first day the exhibition is accessible to the public. For **Performances**, use the date of the first scheduled presentation or showing of the work. For **Other outputs**, this may refer to the date work began on a dataset, software, creative work, or similar non-standard output. Ensure the date reflects the beginning of substantive activity or public engagement, not preliminary planning or internal preparation.
Column Name	start-date
Data Type	Date
Format & Length Layout	(yyyy-mm-dd)
Mandatory/Optional	Optional
Validation Rules	Must comply with the format yyyy-mm-dd.
Example Values	2025-04-25
Other Names	**Conference Start Date** (Conference type) **Awarded Date (Publication)** (Patent type)

Field Name	**Start Year**
Category & Ingest Template	Equipment Category [Provider ID_Dataset #]_equipment.csv
Applicable Types	c-appropriation
Definition	The calendar year in which the appropriation begins and funding becomes available.
Guide for Use	Use this field to specify the year (in YYYY format) when the appropriation takes effect, typically aligning with the start of the government's financial year. This supports accurate financial tracking, reporting, and alignment with budget cycles. For example, an appropriation starting in July 2025 would be recorded as 2025.
Column Name	start-date
Data Type	Date
Format & Length Layout	(yyyy)
Mandatory/Optional	Optional
Validation Rules	Must comply with the format yyyy.
Example Values	2025
Other Names	**Establishment Date (Fund)** (c-fund) **Establishment Date (Fund)** (c-scholarship) **Establishment Date (Fund)** (c-internship) **Establishment Date (Fund)** (c-fellowship) **Establishment Date (Fund)** (c-on-demand) **Establishment Date (Fund)** (c-negotiated) **Establishment Date (Fund)** (c-other)

Field Name	**Subsidiary Organisation**
Category & Ingest Template	External Organisation [Provider ID_Dataset #]_organisations.csv
Applicable Types	c-organisation
Definition	A structured list of identifiers that link the organisation to entities that operate under its ownership, control, or governance.
Guide for Use	This field should record persistent identifiers (e.g. NZBN, ROR, GRID) associated with the entity. Each entry should include the chosen scheme and identifier/s for the organisation. Use accurate and current identifiers that reflect formal relationships such as ministerial oversight, institutional affiliation, or corporate ownership. This information is essential for understanding organisational hierarchy, enabling data integration, and supporting reporting and governance structures. If multiple identifiers exist, record each one clearly and consistently using the identifier-list format. This field should contain the identifier/s of an entity as a single string, with components separated by colon and semicolon (: ;) characters. The components must appear in the following order: scheme : identifier ; scheme : identifier ; scheme : identifier **Scheme**: Provide the fixed-entry identifier type: • ror-id • grid-id • nzbn **Identifier**: Use the official research organisation or business identifier, to uniquely identify the entity.
Column Name	child-organisation-identifiers
Data Type	Identifier-list
Format & Length Layout	scheme:identifier
Mandatory/Optional	Optional
Example Values	ror-id:https://ror.org/01jmxt844; grid-id:grid.xyzgridID;nzbn:987654321099

Field Name	**Successor Organisation**
Category & Ingest Template	External Organisation [Provider ID_Dataset #]_organisations.csv
Applicable Types	c-organisation
Definition	A structured list of identifiers that link the organisation to any entities that have formally taken over its role, functions, or mandate.
Guide for Use	This field should record persistent identifiers (e.g. NZBN, ROR, GRID) associated with the entity. Each entry should include the chosen scheme and identifier/s for the organisation. Use accurate and current identifiers that reflect formal relationships such as ministerial oversight, institutional affiliation, or corporate ownership. This information is essential for understanding organisational hierarchy, enabling data integration, and supporting reporting and governance structures. If multiple identifiers exist, record each one clearly and consistently using the identifier-list format. This field should contain the identifier/s of an entity as a single string, with components separated by colon and semicolon (: ;) characters. The components must appear in the following order: scheme : identifier ; scheme : identifier ; scheme : identifier **Scheme**: Provide the fixed-entry identifier type: • ror-id • grid-id • nzbn **Identifier**: Use the official research organisation or business identifier, to uniquely identify the entity.
Column Name	succeeded-by-organisation-identifiers
Data Type	Identifier-list
Format & Length Layout	scheme:identifier
Mandatory/Optional	Optional
Example Values	ror-id:https://ror.org/01jmxt844;grid-id:grid.xyzgridID;nzbnb:987654321099

Field Name	**Suffix**
Category & Ingest Template	User Category [Provider ID_Dataset #]_users.csv
Definition	This field captures the generational or professional suffix associated with an individual's name. It is used to formally distinguish individuals who share the same name or to reflect an official designation. Common suffixes include generational indicators and professional or academic designations.
Guide for Use	Enter the suffix exactly as provided by the individual. This may include generational suffixes (e.g. "Jr", "Sr", "III") or professional/academic designations (e.g. "Esq", "PhD"). Do not include titles (e.g. Mr, Ms, Dr) or nicknames. Ensure proper capitalisation and punctuation where applicable (e.g. "Jr" rather than "jr" or "JR"). If no suffix is provided, leave this field blank.
Column Name	suffix
Data Type	Text
Mandatory/Optional	Optional
Example Values	Jr, Sr, III

Field Name	**Summary**
Category & Ingest Template	Grant Category [Provider ID_Dataset #]_grants.csv
Applicable Type	c-contract type c-devolved type
Definition	A brief summary, description, or public statement outlining the purpose, scope, or key details of the grant contract. It provides context for understanding the nature and intent of the funded activity.
Guide for Use	Use this field to provide a clear and concise overview of the contract, including its objectives, focus areas, or intended outcomes. Avoid duplicating information from other fields unless necessary for clarity. This field is optional for c-contract type records.
Column Name	description
Data Type	Text
Format & Length Layout	10,240 characters
Mandatory/Optional	Optional for c-contract type Mandatory for c-devolved type
Other Names	**Description (Grant)** (Grant type) **Details** (c-payment type)

Field Name	**Supervisors**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_links.csv
Applicable Types	Thesis / Dissertation type
Definition	The individuals who provided academic oversight, guidance, and support to the student during the development of a thesis or dissertation. Supervisors are typically affiliated with the awarding institution and play a formal role in the research process.
Guide for Use	This field should record the full names of all supervisors as they appear in the source material. Supervisors may include primary, secondary, or co-supervisors. Use the format "First-Name Last-Name" and separate multiple supervisors with a semicolon. Do not use titles (e.g. Dr, Prof). This field is relevant for thesis and dissertation records and helps identify key academic contributors.
Column Name	editors
Data Type	Person-list
Format & Length Layout	For Directly Associated Individuals use [Provider ID_Dataset #]_users.csv and [Provider ID_Dataset #]_links.csv.
Mandatory/Optional	Optional
Other Names	**Editors** (Book type) **Editors** (Chapter type) **Editors** (Conference type) **Editors** (Journal Article type) **Editors** (Other type)

Field Name	**Surname**
Category & Ingest Template	Grant Category [Provider ID_Dataset #]_persons.csv
Definition	This field captures the family name or surname of the user. It is used to formally identify individuals and may reflect cultural naming conventions, including compound or hyphenated surnames. The last name should be recorded using correct spelling and capitalisation.
Guide for Use	Enter the user's last name (surname or family name) exactly as it is provided by the individual. This may include compound or hyphenated names (e.g. "Smith-Jones") and should reflect the individual's preferred spelling and format. Do not include titles (e.g. Mr, Ms, Dr) or generational suffixes (e.g. Jr, Sr) unless they are an official part of the surname. Ensure the name is properly capitalised (e.g. "Nguyen" rather than "nguyen" or "NGUYEN").
Column Name	surname
Data Type	Text
Mandatory/Optional	Mandatory
Example Values	Nguyen, Smith-Jones
Other Names	**Last Name**

Field Name	**Territory**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Patent
Definition	The jurisdiction or geographic region in which the patent has been filed, granted, or is legally enforceable. This refers to the country, region, or international patent authority that governs the intellectual property rights associated with the patent output.
Guide for Use	This field should record the full name of the country, region, or patent authority where the patent was registered or granted (e.g. "United States", "European Patent Office", "Australia"). Use the official name of the jurisdiction and avoid abbreviations (e.g. use "United Kingdom" instead of "UK"). If the patent is filed under an international treaty or agreement (e.g. Patent Cooperation Treaty), specify the relevant authority or treaty name. This information is important for understanding the legal scope, enforceability, and geographic reach of the patent output.
Column Name	location
Data Type	Text
Mandatory/Optional	Optional
Example Values	United States, European Patent Office, Australia
Other Names	**Conference Place** (Conference type) **Country** (Journal Article type) **Location** (Artefact type) **Location** (Other type) **Place of Performance** (Performance type) **Presentation Location** (Presentation type) **Venue** (Exhibition type)

Field Name	**Title (Grant)**
Category & Ingest Template	Grant Category [Provider ID_Dataset #]_grants.csv
Applicable Types	Grant
Definition	The main title of the grant or grant-funded project.
Guide for Use	Enter a clear and descriptive title that reflects the purpose or focus of the grant. Avoid abbreviations unless they are widely recognised or necessary for clarity.
Column Name	title
Data Type	Text
Format & Length Layout	10,240 characters
Mandatory/Optional	Mandatory
Other Names	**Name (Grant)** (c-contract) **Name (Grant)** (c-devolved)

Field Name	**Title (Publication)**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	All
Definition	The full name or heading of a research output, as designated by its creator or publisher, used to identify and describe the work.
Guide for Use	This field should record the full title of the output as it appears in the official or published source. Outputs may include journal articles, books, reports, creative works (such as artefacts, compositions, designs, exhibitions, figures, or performances), and other scholarly or professional publications. The title should be entered exactly as presented, preserving original punctuation, spelling, and capitalisation, including any subtitles, which should be separated from the main title with a colon. Do not abbreviate or modify titles unless required by a specific standard. If the title is in a language other than English, record the language in the **Output Language** field. This information is essential for accurate identification, citation, and linking of outputs across systems and datasets.
Column Name	title
Data Type	Text
Format & Length Layout	10,240 characters
Mandatory/Optional	Mandatory
Example Values	Designing for Sustainability in Urban Spaces, Dataset on Coastal Erosion Patterns, Symphony No. 3 in C Minor

Field Name	**Title (User)**
Category & Ingest Template	User Category [Provider ID_Dataset #]_users.csv
Definition	The honorific or courtesy title associated with an individual, typically used as a prefix to their name (e.g. Mr, Mrs, Ms, Dr, Prof).
Guide for Use	Use this field to capture the individual's honorific or courtesy title, which is typically displayed as a prefix to their name (e.g. Mr, Mrs, Ms, Miss, Dr, Prof). It should not include job titles or positions. Common values include Mr, Mrs, Ms, Miss, Dr, Prof, and may also include less common titles such as Mx, Rev, Sir, or Lady, depending on business requirements. The field is optional and may be left blank if no title is provided. Ensure consistent capitalisation (e.g. "Mr" not "mr") and do not use punctuation (e.g. ".").
Column Name	[title]
Data Type	Text
Mandatory/Optional	Optional

Field Name	**Title Language**
Category & Ingest Template	Grant Category [Provider ID_Dataset #]_grants.csv
Applicable Types	Grant
Definition	The language in which the grant title is written if not English.
Guide for Use	Use this field to specify the language of the title using ISO 639-2 codes (e.g. eng for English, mao for Māori). This supports multilingual data management and ensures accurate interpretation and display.
Column Name	c-title-language
Data Type	Text
Format & Length Layout	3 characters
Code Set Reference	See **Language Codes** section
Mandatory/Optional	Optional
Example Values	mao, cri

Field Name	**Type (Fund)**
Category & Ingest Template	Equipment Category [Provider ID_Dataset #]_equipment.csv
Applicable Types	All
Definition	The classification that indicates the nature or subtype of the fund or funding round record. This field helps the system understand how to process, categorise, and display fund data appropriately.
Guide for Use	This is a mandatory field and must be completed for every fund record. Use this field to specify the type of fund by selecting from the predefined list of allowed values below. Accurate use of this field ensures consistent categorisation across datasets and enables correct filtering, reporting, and presentation on the website.
Data Type	Fixed entry
Format & Length Layout	Fixed
Allowed Values	c-fund c-on-demand c-funding-round c-negotiated c-scholarship c-other c-internship c-appropriation c-fellowship
Mandatory/Optional	Mandatory

Field Name	**Type (Organisation)**
Category & Ingest Template	External Organisation Category [Provider ID_Dataset #]_organisation.csv
Definition	The classification that indicates the nature or subtype of the external organisation record. This field helps the system understand how to process, categorise, and display fund data appropriately.
Guide for Use	This is a mandatory field and must be completed for every organisation record. Accurate use of this field ensures consistent categorisation across datasets and enables correct filtering, reporting, and presentation on the website.
Data Type	Fixed entry
Format & Length Layout	Fixed
Allowed Values	c-organisation
Mandatory/Optional	Mandatory

Field Name	**Type (Grant)**
Category & Ingest Template	Grant Category [Provider ID_Dataset #]_grants.csv
Applicable Types	All
Definition	The classification that indicates the nature of the grant record. This field helps the system understand how to process and display the data appropriately.
Guide for Use	Use this field to specify the type of record using the predefined allowed values below. This ensures consistent categorisation across datasets and enables accurate filtering, reporting, and system behaviour.
Data Type	Fixed entry
Format & Length Layout	Fixed
Allowed Values	grant c-contract c-payment c-devolved
Mandatory/Optional	Mandatory

Field Name	**Type (Publication)**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	All
Definition	The classification that indicates the nature of the publication record. This field helps the system understand how to process and display the data appropriately.
Guide for Use	Use this field to specify the type of record using the predefined allowed values below. This ensures consistent categorisation across datasets and enables accurate filtering, reporting, and system behaviour.
Data Type	Fixed entry
Format & Length Layout	Fixed
Allowed Values	book media chapter other conference patent journal-article performance artefact presentation composition poster dataset report design scholarly-edition exhibition software figure thesis-dissertation fileset preprint internet-publication
Mandatory/Optional	Mandatory

Field Name	**URL**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Book Chapter Conference Journal Article
Definition	The web address that links directly to the published version or official landing page of a book, book chapter, conference paper, or journal article, as hosted by the publisher or platform.
Guide for Use	This field should record the full and direct URL to the research output exactly as provided by the publisher or hosting organisation. Include the complete link starting with http:// or https://, and do not abbreviate, shorten, or embed the URL in other text. For other output types use the **Publisher URL** field. This information is essential for enabling access, citation, and verification of the research output in digital environments.
Column Name	publisher-url
Data Type	url
Format & Length Layout	Avoid using shortened or redirected links (e.g. Bitly), and do not embed hyperlinks within other text – record the URL as plain text only. Ensure the URL is not followed by punctuation such as a full stop or comma unless required by external citation formatting. Always verify that the link leads directly to the intended research output or landing page and is publicly accessible where possible.
Mandatory/Optional	Optional
Example Values	https://springer.com/book/9783030123456
Other Names	**Publisher URL**(Report type) **Publisher URL** (Scholarly Edition type) **Publisher URL** (Other type) **Publisher URL** (Artefact type) **Publisher URL** (Composition type) **Publisher URL** (Design type) **Publisher URL** (Exhibition type) **Publisher URL** (Performance type) **Publisher URL** (Thesis/Dissertation type) **Publisher URL** (Preprint type) **Publisher URL** (Dataset type) **Publisher URL** (Patent type) **Publisher URL** (Software / Code type) **Publisher URL** (Internet Publication type)

Field Name	**Username**
Category & Ingest Template	User Category [Provider ID_Dataset #]_users.csv
Definition	This is a mandatory system field used to identify users within the system. It must be a unique value for each user and is used for internal reference purposes only.
Guide for Use	Populate this field using the same value as the **Proprietary_ID** field. This ensures consistency and supports accurate user identification across systems.
Column Name	username
Data Type	Text
Format & Length Layout	32 characters
Mandatory/Optional	Mandatory
Validation Rules	Must match the **Proprietary_ID**
Example Values	0902-0234-3547-5868

Field Name	**Value**
Category & Ingest Template	Grant Category [Provider ID_Dataset #]_grants.csv
Applicable Types	All
Definition	The monetary value associated with the record. For grant type records, this is the amount awarded; for contract type records, the total contract value; and for payment type records, the total payment amount.
Guide for Use	Use this field to record the full value of the grant in the relevant currency. This supports financial tracking, budgeting, and reporting.
Column Name	amount
Data Type	Money
Format & Length Layout	Integer values only to two decimal places
Mandatory/Optional	Mandatory
Validation Rules	No special characters allowed (e.g. "$")
Example Values	100000.00

Field Name	**Venue**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Exhibition
Definition	The city or location where the exhibition took place. This refers to the physical or virtual site where the artefact, artwork, installation, or other exhibition-based research was publicly presented or displayed as part of a formal event, gallery showing, or curated programme.
Guide for Use	This field should record the full name of the city or location where the exhibition took place. Include additional geographic identifiers such as state or country if needed for clarity. Do not abbreviate or modify the place name. If the exhibition was held online or virtually, record as "Online" or "Virtual" as appropriate. If the exhibition was part of a touring or multi-site event, record the primary or first venue where the research output was exhibited. This information is important for citation, indexing, and understanding the context and reach of the exhibition output.
Column Name	location
Data Type	Text
Mandatory/Optional	Optional
Example Values	Berlin, Wellington, NZ, San Francisco
Other Names	**Conference Place** (Conference type) **Country** (Journal Article type) **Location** (Artefact type) **Location** (Other type) **Place of Performance** (Performance type) **Presentation Location** (Presentation type) **Territory** (Patent type)

Field Name	**Volume**
Category & Ingest Template	Publication Category [Provider ID_Dataset #]_publications.csv
Applicable Types	Book Chapter Conference Journal Article Other
Definition	The numbered or named grouping of a published work that indicates its place within a larger series or collection, such as a journal, book set, or conference proceedings.
Guide for Use	This field should record the volume number or title exactly as stated in the publication. Use the publisher's or conference organiser's wording without modification. If no volume is specified, leave the field blank. This information is important for identifying and citing the correct part of a multi-volume work or serial publication, and for distinguishing between outputs published in different volumes of the same series.
Column Name	volume
Data Type	Text
Mandatory/Optional	Optional
Example Values	Vol. 12, Volume II, 2025 Proceedings Volume A

Field Name	**Vote**
Category & Ingest Template	Equipment Category [Provider ID_Dataset #]_equipment.csv
Applicable Types	c-appropriation
Definition	The name of the government appropriation or budget grouping from which the fund receives its financial resources. (e.g. Vote Health, Vote Education).
Guide for Use	The vote name should match the official title used in government budget documents to ensure consistency and traceability. Accurate use of this field links the fund to its source of public funding, supports financial accountability, and enables correct categorisation and display of funding information on the website. It also helps users understand which part of government is responsible for the financial provision.
Column Name	c-vote
Data Type	Text
Format & Length Layout	255 characters
Mandatory/Optional	Optional
Example Values	Vote Business, Science and Innovation

Field Name	**Website URL**
Category & Ingest Template	External Organisation Category [Provider ID_Dataset #]_organisations.csv
Applicable Types	c-organisation
Definition	The web address of the organisation's official website.
Guide for Use	This field should record the full and direct URL (Uniform Resource Locator) that links to the organisation's primary online presence. Use the complete address including the protocol (e.g. https://) and ensure it points to the homepage or main landing page. Avoid shortened links or internal subpages unless specifically required. Ensure the URL is current, publicly accessible, and aligns with official records or communications.
Column Name	url
Data Type	url
Format & Length Layout	The URL field should contain a valid web address beginning with http:// or https://, follow standard URL syntax, avoid spaces or invalid characters, and be publicly accessible. The recommended maximum length is 255 characters, with a minimum of around 12 characters.
Mandatory/Optional	Optional
Example Values	https://www.mbie.govt.nz/

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